2007 Evaluation Initiatives

Bottom line: Several items and areas within the US Army's Evaluation Systems are being updated in this year and should be of interest to any one who is:

- a rated officer or NCO
- a rating official
- a person who manages or supports an evaluation system

Purpose: This presentation provides information on the upcoming changes and recommendations for critical areas when managing an effective unit evaluation systems.

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08

Evaluation System Initiatives – part 1

- OER by e-mail for deployed units
  - used since Apr 03, expanded, and now restricted to only units deployed into (or supporting) theater
  - it's functional; but, should be used only as necessary (not reliable)
  - requires user to be authorized and to double check that reports arrive and complete processing
- Electronic Evaluations **(MILPER Msg 07-043)**
  - incorporated into AR 623-3 and DA PAM 623-3
  - uses wizard forms with CAC signatures (no special authorizations)
  - content transfers from support forms to final evaluations
  - tracking and management info available with "My Forms" on AKO
  - electronic submissions to HRC using "My Forms" on AKO mandatory after 1 April 2008 (more on these points later)

Goals: 100% accountability and accuracy, speed through the system, one Army standard and a single point of access

Evaluation System Initiatives – part 2

- Single OER Senior Rater Profile **(MILPER Msgs 07-072 and 07-102)**
  - OER received on or before 21 May 07 profiled using 3 profiles, separated by grade and component (AC, USAR, ARNG); (received date – not THRU date determines)
  - OER received on & after 22 May 07 profiled using 1 profile, separated by grade (received date – not THRU date determines)
  - requires no close out OER or profile restarts
  - options provided to senior raters who, as a result of combined profiles, achieve greater than 50% ACOM profile for any rank
  - on & after 22 May 07 all OER are submitted to HRC Alexandria w/ following processes:
    - AKO My Forms submissions will open for USAR and ARNG OER (already AC)
    - originals (paper copies) will be sent to: USA HRC, ATTN: AHRC-MSE-R (Room 5S67), 200 Stovall St Alexandria VA 22332-0442
    - all OER, NCOER, & AER are required at HRC within 90 days after THRU date on the report. (This synchronizes 5 requirements into 1)
  - Interactive Web Response System (IWRS) and SR Profile Online will reflect all OER information received on & after 22 May 07
  - Transition dates have been selected so to not disrupt selection boards.

Goals: 100% accountability and accuracy, speed through the system, one Army standard and a single point of access

Evaluation System Initiatives – part 3

- Evaluation Timeliness Report **(MILPER Msg 07-073)**
  - tracks OER received at HRC after 1 Jun 07 and NCOER received at HRC after 1 Oct 07 and ties submissions to individual senior raters
  - senior raters can view their report in the online application for senior rater profiles
    - currently, only active OER are reflected in this tool but USAR and ARNG OER information will be included on & after 22 May; see below for NCOER info
  - IWRS will be updated to provide better consolidated reports to units
  - DCS, G-1 is authorized to post this report, if necessary, in senior rater's OMPFs where it could be viewed by career managers and selection boards
- Single Evaluation Processing System
  - 1 May 2008 USAR and Regular Army NCOER will consolidate to one location for submission and processing.
  - 1 May 2008 IWRS reports and Eval Timeliness Reports will reflect NCOER information for RA and USAR. ARNG NCOER remain at State level for processing to OMPF. NCO senior raters will be able to access SR Profile Online to obtain their timeliness report.

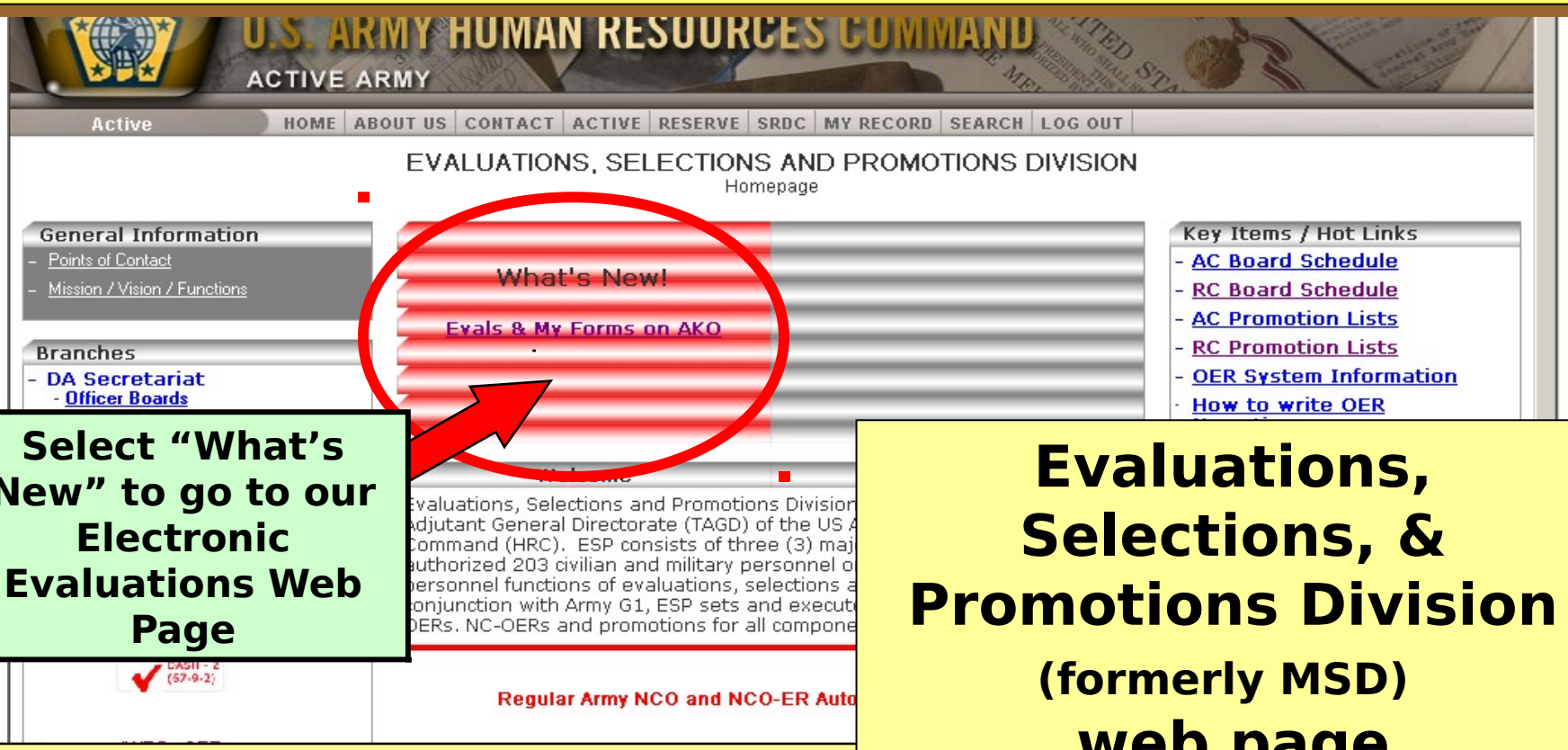
Goals: 100% accountability and accuracy, speed through the system, one Army standard and a single point of access

Evaluation System Initiatives – part 4

- AR 623-3 and DA PAM 623-3 updates
  - 10 Sep 07 revision incorporates the single OER senior rater profile and Evaluation Timeliness Report initiatives and administrative error fixes
  - expect a subsequent short staffing and another update in 2008 timeframe with the changes needed for single point of submission for all reports and other requirements
  - the subsequent short staffing version regulation should include items such as:
    - requirement to include deployability status (personal and subordinates) as part of the counseling process (similar to that required for safety)
    - revised chapters for USAR and ARNG showing only those items that are different
    - submission of NCOER to a single location
    - improved presentation of information for AER processing
    - anything else you suggest or we can get in there...

Goals: 100% accountability and accuracy, speed through the system, one Army standard and a single point of access

Answers & Training Located:



Select "What's New" to go to our Electronic Evaluations Web Page

Evaluations, Selections, & Promotions Division (formerly MSD) web page

To get here, go to HRC On-Line:
https://www.hrc.army.mil
Select "HRC-Alexandria" then "The Adjutant General" then "Management Support

These slides do not cover:

1. AER. Note: We mention them here and they are available in My Forms and in electronic ATRRS (which is neat); but, we need a different training package to explain these forms.

2. How to fill out evaluations. Note: See DA PAM 623-3 or use forms wizards.

3. Interaction with DIMHRS. Note: Will be covered in the future but by executing the processes outlined here gets you ready for DIMHRS.

4. Basic evaluation rules. Note: Specific policy and processing information can be found the AR 623-3 and DA PAM 623-3 and on our website. For matters of brevity in this presentation I made the assumption that you know the basic rules surrounding OER and NCOER.

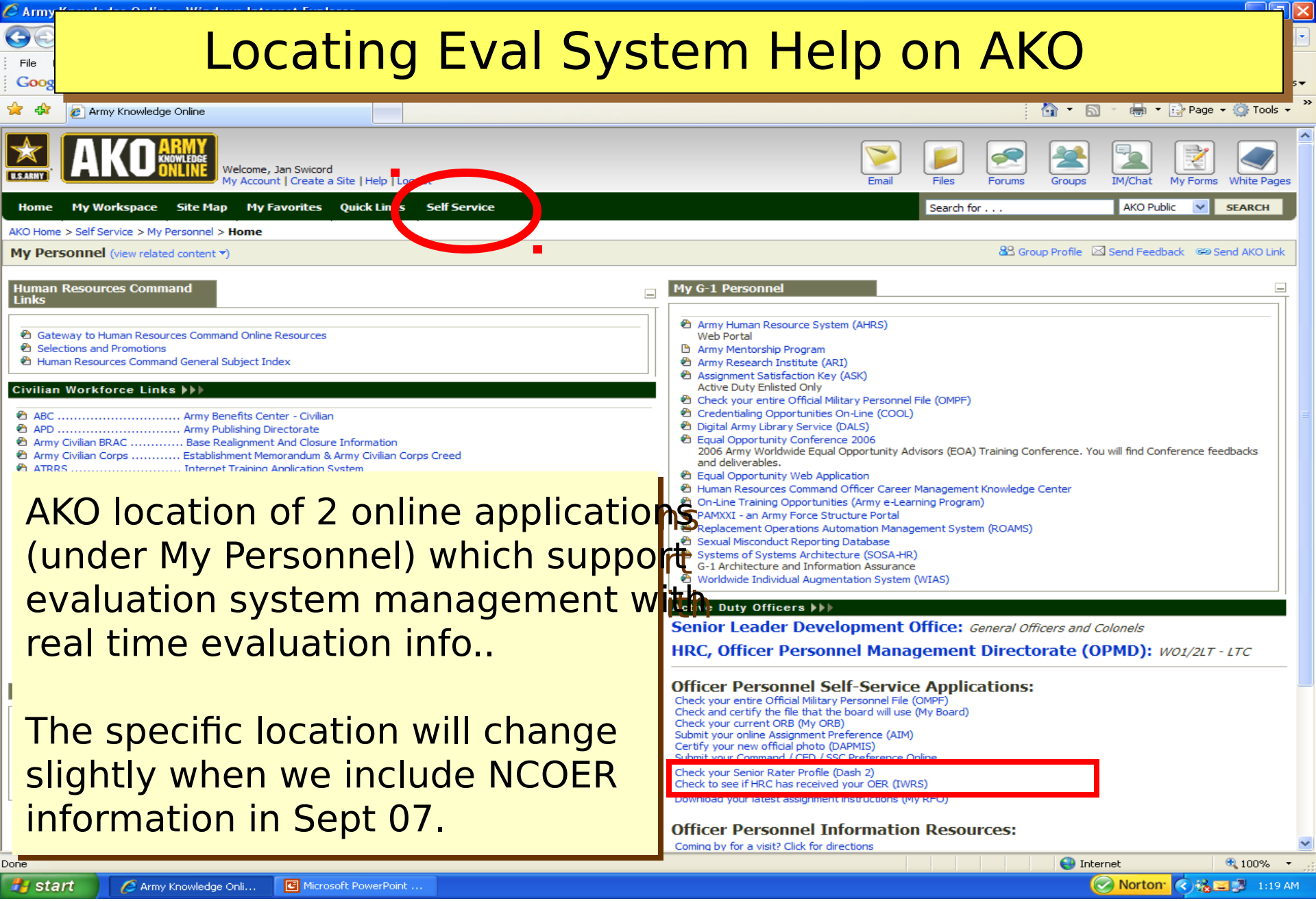
5. Additional help on any of your evaluation topics, specifically on these topics, can be found at our website.

We'll move on to managing an evaluation system and the important elements that need attention …

Points for Eval Systems Managers ...

- The online SR profile for AC OER includes The Evaluation Timeliness Report. It tracks OER received 1 Jan 07 and will be reset to 1 Jun 07.
- This SR profile will include OER submission information on USAR & ARNG OER after SR Profile consolidation effective (date).
- Timeliness is calculated using date of receipt at HQDA and THRU date on report. A report is on time when received within 90 days after its THRU date.
- Submission requirements synchronized to 90 days for all reports with the OER SR Profile consolidation, effective (date).
- By Sep 07 Active and USAR NCOER information will reflect in this report. ARNG NCOER information will remain at State level. Additional messages will detail the transition for NCOER.
- Once we start tracking NCOER information, any Senior Rater (officer or NCO) will be able to access the SR Profile on time to obtain their timeliness report.

Locating Eval System Help on AKO


Army Knowledge Online
AKO ARMY KNOWLEDGE ONLINE
Welcome, Jan Swicord
My Account | Create a Site | Help | Logout
Email
Files
Forums
Groups
IM/Chat
My Forms
White Pages
Home
My Workspace
Site Map
My Favorites
Quick Links
Self Service
Search for . . .
AKO Public
SEARCH
AKO Home > Self Service > My Personnel > Home
My Personnel (view related content)
Group Profile
Send Feedback
Send AKO Link
Human Resources Command Links
Gateway to Human Resources Command Online Resources
Selections and Promotions
Human Resources Command General Subject Index
Civilian Workforce Links
ABC ..... Army Benefits Center - Civilian
APD ..... Army Publishing Directorate
Army Civilian BRAC ..... Base Realignment And Closure Information
Army Civilian Corps ..... Establishment Memorandum & Army Civilian Corps Creed
ATRRS ..... Internet Training Application System
My G-1 Personnel
Army Human Resource System (AHRS)
Web Portal
Army Mentorship Program
Army Research Institute (ARI)
Assignment Satisfaction Key (ASK)
Active Duty Enlisted Only
Check your entire Official Military Personnel File (OMPF)
Credentialing Opportunities On-Line (COOL)
Digital Army Library Service (DALS)
Equal Opportunity Conference 2006
2006 Army Worldwide Equal Opportunity Advisors (EOA) Training Conference. You will find Conference feedbacks and deliverables.
Equal Opportunity Web Application
Human Resources Command Officer Career Management Knowledge Center
On-Line Training Opportunities (Army e-Learning Program)
PAMXXI - an Army Force Structure Portal
Replacement Operations Automation Management System (ROAMS)
Sexual Misconduct Reporting Database
Systems of Systems Architecture (SOSA-HR)
G-1 Architecture and Information Assurance
Worldwide Individual Augmentation System (WIAS)
Active Duty Officers
Senior Leader Development Office: General Officers and Colonels
HRC, Officer Personnel Management Directorate (OPMD): WO1/2LT - LTC
Officer Personnel Self-Service Applications:
Check your entire Official Military Personnel File (OMPF)
Check and certify the file that the board will use (My Board)
Check your current ORB (My ORB)
Submit your online Assignment Preference (AIM)
Certify your new official photo (DAPMIS)
Check your Senior Rater Profile (Dash 2)
Check to see if HRC has received your OER (IWRS)
Officer Personnel Information Resources:
Coming by for a visit? Click for directions
Done
Internet
100%
start
Army Knowledge Onli...
Microsoft PowerPoint ...
Norton
1:19 AM

AKO location of 2 online applications (under My Personnel) which support evaluation system management with real time evaluation info..

The specific location will change slightly when we include NCOER information in Sept 07.

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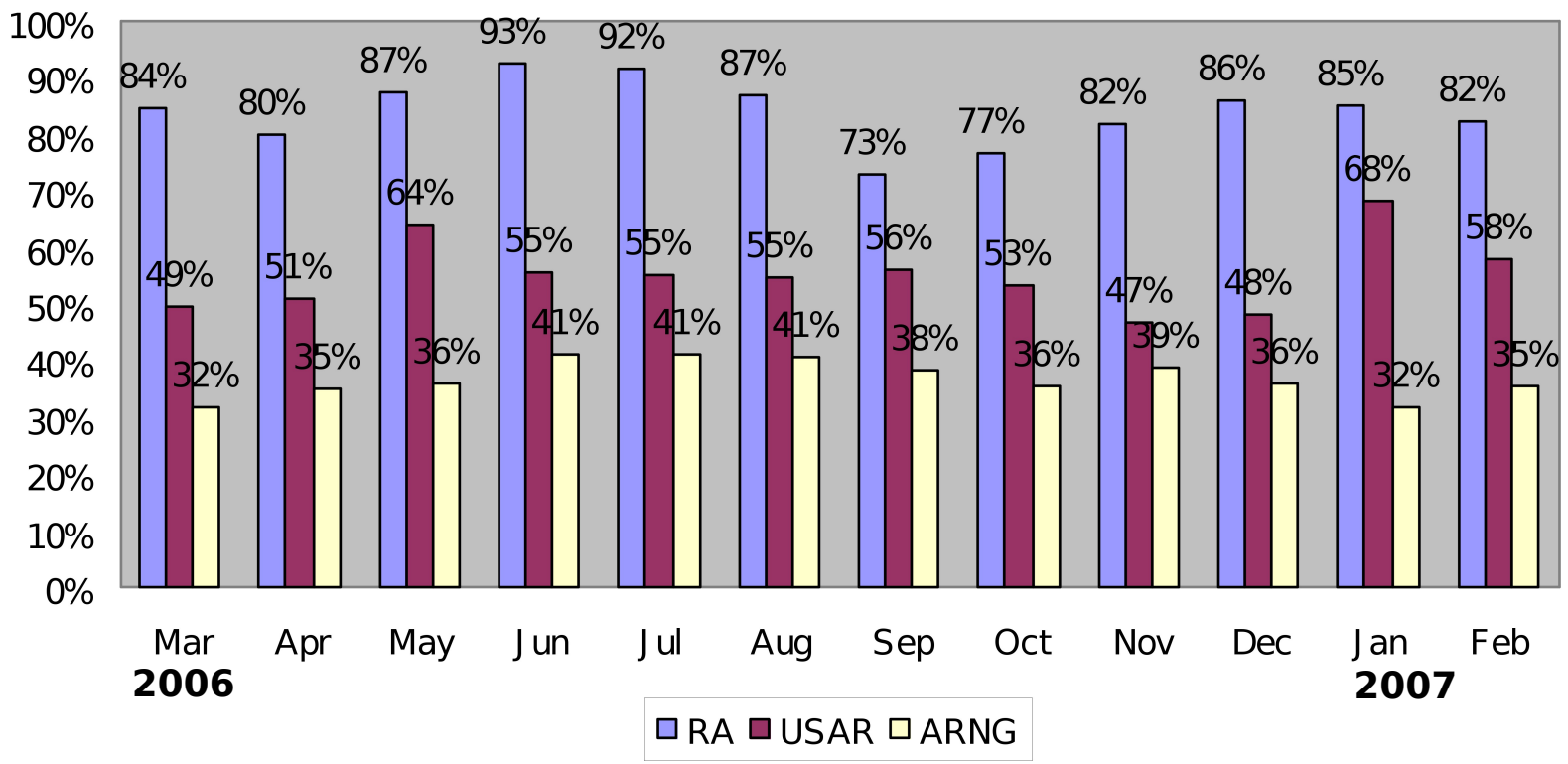
As of: 7 Apr 08

Reason behind an interest in late submissions …

This chart reflects how units submit OER based on date of receipt at HQDA.

Goal: 95% or greater received at HQDA on time

Chart reflects on time within 90 days for AC and 120 days for USAR & ARNG.



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As of: 7 Apr 08

But more than just a late report …

1. Timely submission of evaluation reports is a measurable indicator of how well the Army (and an individual senior rater) is fulfilling its responsibilities in taking care of and developing subordinates.

2. Evaluation systems provide information to both rated Soldiers and to selection boards & career managers. Reports are a critical element in the process of selecting and assigning leaders for the future.

The process of preparing and completing an evaluation does not have to be difficult if you follow AR 623-3 intent and use available tools:

- an evaluation report (OER or NCOER) is the final product
- an evaluation report is an assessment on the rated Soldier's performance and potential made by designated and authorized rating officials
- an evaluation period and its derived benefits start with, and continue throughout, counseling and leader development
- IWRS information and My Forms help the preparation process
- S1/Human Resource (HR) managers can assist rating

Bde S1 Role (an example)

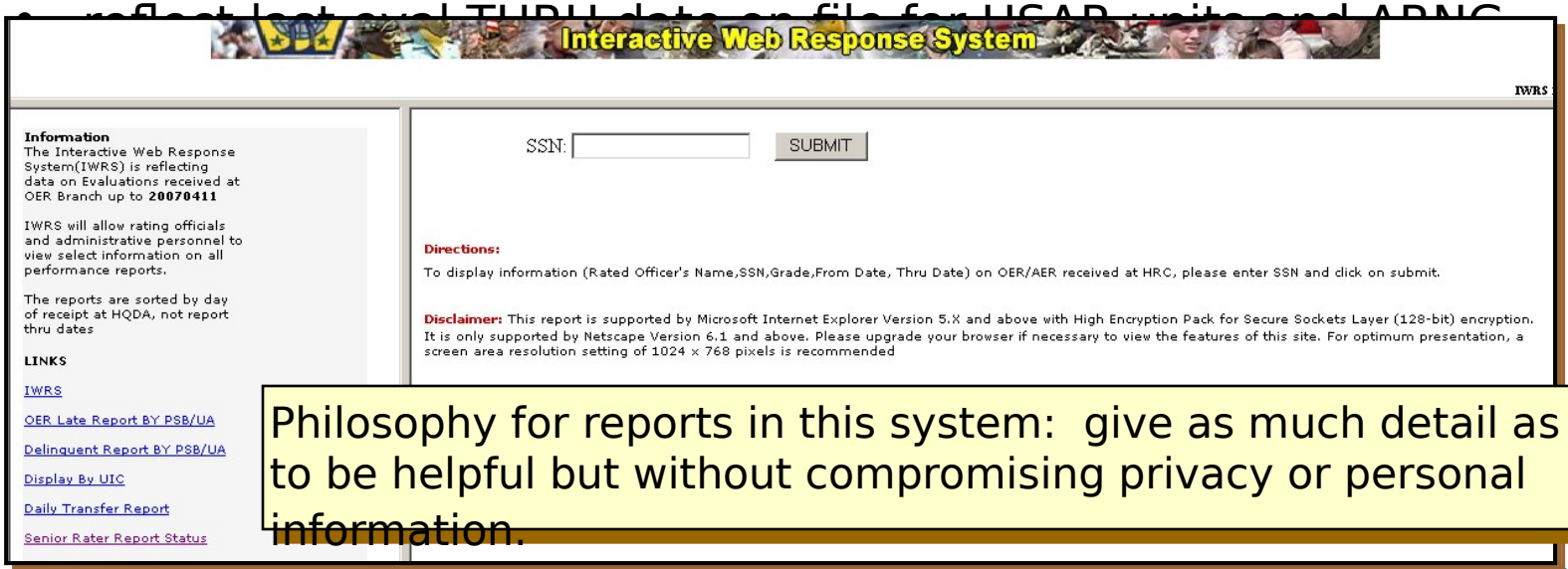
- Manage BDE evaluations program
  - Establish rating schemes for commander
  - Anticipate unscheduled evaluations
  - Assist BDE Cdr in evaluation system management (particularly SR Rater Profiles)
  - Quality control all evaluations (with CSM/SGM for NCOER)
  - Manage (oversite at least) submissions to HRC
- Educate the populations population
  - BN S1s
  - Supervisors (rating officials)
  - BDE Cdr
  - Rated Soldiers

Bottom line: Staying out of trouble in the evaluation business as an S1/HR Manager

1. Keep and maintain rating schemes.
   - Note promotions, job changes, incoming, departing
   - Use online tools to track & project the "next report"
2. Keep commanders/senior raters involved; it's their system.
   - They develop and effectively communicate a rating philosophy
   - They focus on proactive actions (counseling, development)
3. Use My Forms processes, forms, and signatures as intended
   - Start with support forms and transfer to evaluations
   - Never make shells. If you must: create a support form shell
   - Route forms behind AKO and always use the wizard to add content (deviations from this process work but raise risk of problems)
4. Don't sign, or have Soldiers sign, blank forms (becoming obsolete but still a problem)
5. Don't present "false information" on reports.
   - Individual reports are snapshots in time.
   - Every action has an impact (whether you see it or not)
   - 2d and 3rd order impacts are ones that come back to bite you.
6. Call and ask for guidance if you run into odd situations.

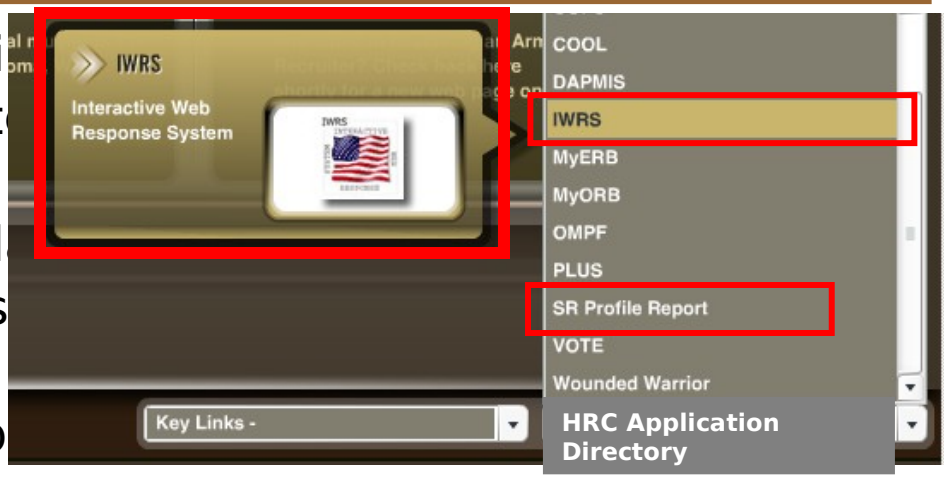
Getting information about reports ...

1. The Interactive Web Response System (IWRS) is an online tool which provides administrative information in a variety of reports on AC OER. It will expand to reflect all received OER and NCOER (except ARNG NCOER).
2. A detailed SOP showing each of the reports and potential uses is available upon request from ESO.
3. We update reports regularly. The next set will:
   - reflect last eval THRU date on file by PSB/UA Code (vice just UIC)
   - reflect last eval THRU date on file for USAR units and ARNG


Interactive Web Response System
IWRS
Information
The Interactive Web Response System(IWRS) is reflecting data on Evaluations received at OER Branch up to 20070411
IWRS will allow rating officials and administrative personnel to view select information on all performance reports.
The reports are sorted by day of receipt at HQDA, not report thru dates
LINKS
IWRS
OER Late Report BY PSB/UA
Delinquent Report BY PSB/UA
Display By UIC
Daily Transfer Report
Senior Rater Report Status
SSN:
SUBMIT
Directions:
To display information (Rated Officer's Name,SSN,Grade,From Date, Thru Date) on OER/AER received at HRC, please enter SSN and click on submit.
Disclaimer: This report is supported by Microsoft Internet Explorer Version 5.X and above with High Encryption Pack for Secure Sockets Layer (128-bit) encryption. It is only supported by Netscape Version 6.1 and above. Please upgrade your browser if necessary to view the features of this site. For optimum presentation, a screen area resolution setting of 1024 x 768 pixels is recommended

Philosophy for reports in this system: give as much detail as possible to be helpful but without compromising privacy or personal information.

Points for Profile Managers ...



1. Obtain a copy of the current profi
status (either on line from senior rat
or requested from ESO.) This
becomes the base line profile. (Valid
the profile, if needed, after the trans
period to consolidated profiles.)
2. Accurately track all submitted rep
into HRC and watch for those returned for correction. Reports profile based on received date at HRC. Reports returned for correction may not be "received" yet.
3. Project report "opportunities" due to annual requirements, changes of rater, or complete the record or other optional reports. (see slide of profile plan)
4. Review senior rater assessments regularly to test rating philosophy with current population and profile status.
5. Don't forget the Soldier evaluations which do not have a profiled box check. Include these Soldiers in the senior rater philosophy and tracking systems. A detailed assessment and timely preparation and submission of those reports is critical to Army success also (both

Senior Rater Profile Report: DA FORM 67-9-2

SENIOR RATER PROFILE REPORT
OFFICER EVALUATION REPORTING SYSTEM
FOR USE OF THIS FORM, SEE AR 623-3; PROPONENT AGENCY IS DCS, G-1

A. NAME	B. SSN	C. RANK	D. DATE OF REPORT

	CURRENT OER PROFILE					PROFILE HISTORY		
	ACOM COM	COM	BCOM RETAIN	BCOM DO NOT RETAIN	Total Ratings	Total Ratings	1st Block COM	% Total 1st Block
MG	*Do Not Receive block VIIb. Box Check*							
BG								
COL								
LTC								
MAJ								
CPT	*Do Not Receive block VIIb. Box Check*							
1LT	*Do Not Receive block VIIb. Box Check*							
2LT	*Do Not Receive block VIIb. Box Check*							
CW5	*Do Not Receive block VIIb. Box Check*							
CW4								
CW3								
CW2	*Do Not Receive block VIIb. Box Check*							
WO1	*Do Not Receive block VIIb. Box Check*							

DA FORM 67-9-2 15 May 06

The senior rater profile history report (separated by grade) after 22 May 07.

To obtain a copy:

Email: tapcmse@conus.army.mil
Online: www.hrc.army.mil (USA HRC)
Online: AKO / Self Service / Personnel

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
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Profile Consolidation Examples (1)

- Senior Raters (SR) with profiles on officers in only one component will not be affected. SR will comply with consolidated procedures (i.e., AKO My Forms use, Alexandria address for submissions, within 90 day from THRU date, and visibility in IWRS, SR Profile, and Timeliness Report online).
- Senior Raters with profiles on officers in more than one component will have their existing profiles combined into one. SR will comply with consolidated procedures (i.e., AKO My Forms use, Alexandria address for submissions, within 90 day from THRU date, and visibility in IWRS, SR Profile, and Timeliness Report online).
- An example follows:

<u>Prior to consolidation</u>
<u>SR has 3 profiles for LTC:</u>

Active: 6-8-1-0, 15, 40%
USAR: 4-10-0-1, 15, 26%
ARNG: 1-5-0-0, 6,

<u>After consolidation</u>
<u>SR has 1 profile for LTC</u>:

11-23-1-1, 36, 30.5%

Reminder: profile numbers reflect as ACOM-COM-BCOM R-BCOM NR, Total, Percent ACOM

Profile Consolidation Examples (2)

- Combining profiles may result in a senior rater (SR) having a profile with Above Center of Mass (ACOM) equal to or greater than 50%
- A senior rater in this situation may:

(1) Do nothing and use subsequent OERs to achieve an authorized percentage of ACOM for that rank which is less than 50%. Next reports submitted are COM.

(2) Contact ESO; request a restart of the profile. HQDA will waive requirements (i.e., senior rater permission, 3 processed reports, and a documented misfire) when the misfire is caused by profile consolidation.

- AR 623-3 policy: When SR completes his/her first 4 OER for any grade, the profile may equal 100% or 50% for the one ACOM report. The other reports will be C

<u>Prior to consolidation</u>
<u>SR has 3 profiles for LTC:</u>

Active: 1-2-0-0, 2, 50%
USAR: 1-1-0-0, 2, 50%
ARNG: 1-0-0-0, 1, 100%

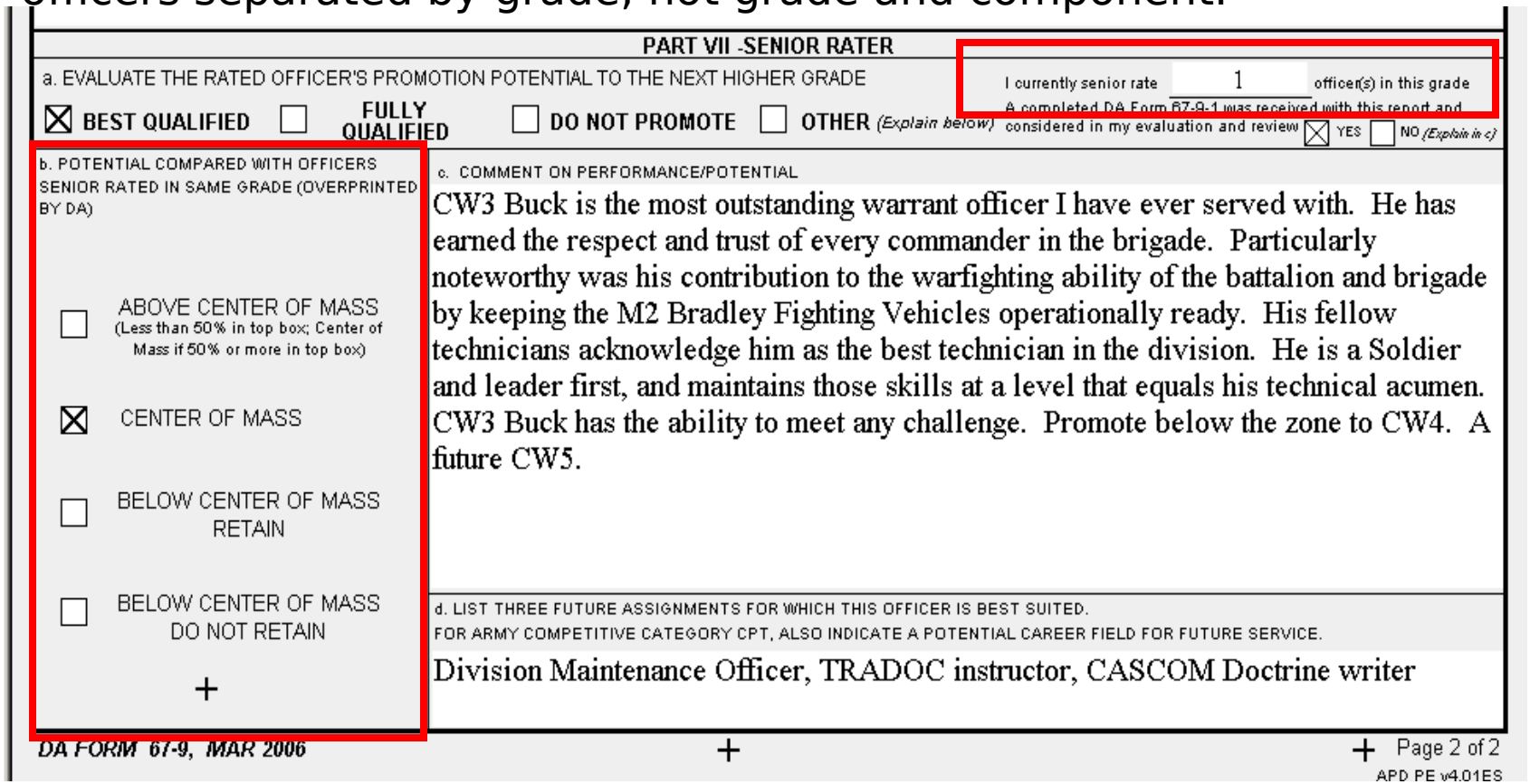
<u>After consolidation</u>
<u>SR has 1 profile for LTC</u>:

3-2-0-0, 5, 60%

Reminder: profile numbers reflect as ACOM-COM-BCOM R-BCOM NR, Total, Percent ACOM

Profile Consolidation & DA Form 67-9

Any consolidation of the senior rater profile impacts Part VII.b box check and the Part VII.a answer to “I currently senior rate (#) officers in this grade.” After consolidation this information should consider officers separated by grade, not grade and component.



PART VII -SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

I currently senior rate 1 officer(s) in this grade

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review ☒ YES ☐ NO (Explain in c)

☒ BEST QUALIFIED ☐ FULLY QUALIFIED ☐ DO NOT PROMOTE ☐ OTHER (Explain below)

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

☐ ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box)

☒ CENTER OF MASS

☐ BELOW CENTER OF MASS RETAIN

☐ BELOW CENTER OF MASS DO NOT RETAIN

c. COMMENT ON PERFORMANCE/POTENTIAL

CW3 Buck is the most outstanding warrant officer I have ever served with. He has earned the respect and trust of every commander in the brigade. Particularly noteworthy was his contribution to the warfighting ability of the battalion and brigade by keeping the M2 Bradley Fighting Vehicles operationally ready. His fellow technicians acknowledge him as the best technician in the division. He is a Soldier and leader first, and maintains those skills at a level that equals his technical acumen. CW3 Buck has the ability to meet any challenge. Promote below the zone to CW4. A future CW5.

d. LIST THREE FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED.
FOR ARMY COMPETITIVE CATEGORY CPT, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Division Maintenance Officer, TRADOC instructor, CASCOM Doctrine writer

DA FORM 67-9, MAR 2006

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APD PE v4.01ES

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Which profile will HRC apply?

- OER received on or before 21 May 07 will profile using 3 profiles, separated by grade and component (AC, USAR, ARNG)
- OER received on & after 22 May 07 will profile using 1 profile, separated by grade
- Date of receipt at HQDA (and not THRU date on report) determines application

Rated Officer: LTC in AC THRU date on OER: 1 Mar 07 Received by HQDA: 20 May 07	• Submitted to HRC Alexandria • Profiles using Senior Rater's AC profile for LTC
Rated Officer: LTC in USAR THRU date on OER: 1 Mar 07 Received by HQDA: 20 May 07	• Submitted to HRC St Louis • Profiles using Senior Rater's USAR profile for LTC
Rated Officer: LTC in USAR THRU date on OER: 16 Apr 07 Received by HQDA: 25 May 07	• Submitted to HRC Alexandria • Profiles using Senior Rater's consolidated profile for LTC

AR 623-3 Policy Reminders:

- AR 623-3 and DA PAM 623-3 contain policy and procedures for evaluations.

- A senior rater must maintain a percentage of ACOM box checks below 50% for each grade. (AR 623-3, para 3-11.a.)

- While a senior rater is writing the first four OER for any grade the ACOM percentage may equal 100% or 50% but only when the first ACOM is rendered.
  (AR 623-3, para 3-11.d.)

- An OER or NCOER may be signed up to 14 days prior to the THRU date.
  (AR 623-3, para 3-37.f.(3))

- An OER or NCOER cannot be forwarded to HQDA until the THRU date.

Note: This restricts electronic submissions primarily. HQDA cannot

References are being changed to reflect the revised policy reflected in this presentation and will be released as soon as possible as an updated publication.

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Develop a Senior Rater Rating Plan

Name	Position	# of OERs previously received in current position (include previous SR's OERS)	Last OER/Type/Rating *Codes:* Change of Rater - CR; Change of Duty - CD; PCS - PCS; Annual - AN; Com the Record - CTR; SR Option - SO; Relief for Cause - RFC *Ratings* ACOM/COM/BCOM	Projected OER Date of next OER	Projected Type Type of report (Use Codes)	Projected Rating How I would rate this officer if I rated everyone today <50% in ACOM (Adjust as events dictate)	OER to DA (90days) Date report needs to be at DA (except board reports need to get to DA per board message)	Subsequent OER Will the officer receive more reports from you after the proj OER, if so how many	Cohort YG	Next Board/Date Next selection board the officer would be eligible for (Use chart profile management board dates)	Projected Departure/ Promotion
Black, A	BN XO 1/35 Inf	1	Jun 04/CR/COM	Jun-05	AN	COM	Sep-05	Yes (1)	1991	BZ LTC- Mar-05	Nov-06
Smith,D	BN S3 1/35 Inf	1	Jun 04/CR/ACOM	Dec-05	PCS	ACOM	Mar-05	No	1991	BZ LTC-Jan-06	Dec-06
Jones, T	BN Cdr 1/35 Inf	0	Jun 04/CR/COM	Jun-05	AN	ACOM	Sep-05	Yes (1)	1992	BZ COL-Jul-05	Jun-06
Davis, R	BN XO 1/36 Inf	0	Jun 04/CR/COM	May-05	CD	COM	Aug-05	No	1992	BZ LTC-Jan-07	Jun-05
Pike, M	BN S3 1/36Inf	0	Jun 04/CR/COM	Jun-05	AN	ACOM	Sep-05	Yes (1)	1991	BZ LTC-Jan-06	May-06
Bass, S	BN Cdr 1/36 Inf	2	July 04/CD/COM					No	1990	BZ Col-Jul-05	Aug-06
Doe, J	Bde S-1	1	Aug 04/PCS/ACOM					No	1992	BZ LTC-Jan-07	Aug-07
Buck, J	Bde CM Off	0	Sep04 /CR/COM	Sep-05	AN	COM	Dec-05	Yes (1)	1991	BZ Major-Oct-05	Jun-06
Fawn, B	Bde S-3	1	Sep 04/CR/ACOM	Apr-99	PCS	ACOM	Jul-05	No	1992	BZ LTC-Jan-07	Apr-06
Rockfish, A	BN Cdr Support	0	Jun 04/AN/COM	Jun-05	CD	COM	Sep-04	Yes (1)	1990	BZ Col-Jul-05	Jan-06
			Example								

Note: Promotable Officers serving in positions authorized the promotable grade will be profiled at the promotable grade if listed as (P) in the grade block of the OER.

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As of: 7 Apr 08

Points for Timely Submissions ...

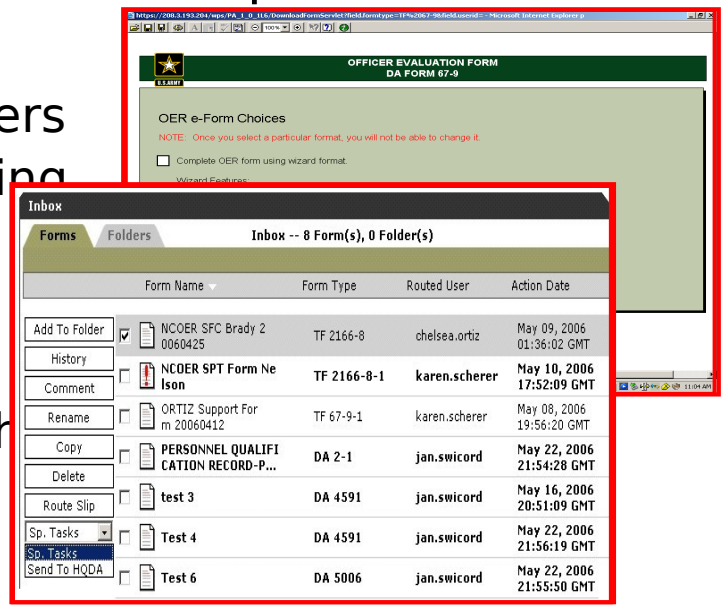
1. Rating officials who document counseling have an easy time completing and submitting evaluations in a timely manner.
   - Anyone can start a support form, drawing information from ITAPDB (obtaining needed admin information)
   - A single step in My Forms transfers all information from the support form to a final OER or NCOER
   - Forms can be routed around officials for signature and corrections
2. On & after 22 May 07 (date for profile consolidation) all reports (OER, NCOER, and AER) will be due at HQDA within 90 days after THRU date on the report.
3. OER: on & after 22 May 07 submit to HRC Alexandria either electronically with My Forms or by mail with paper
4. NCOER: expected that by Sep 07 will be submitted to HRC, same as OER (except for ARNG NCOER)
5. HRC will officially track all OER received after 1 Jun 07 and NCOER after 1 Oct 07. ARNG NCOER will remain at State level for processing to Soldier OMPF. Evaluation Timeliness Reports are tied to senior raters.
6. Check MILPER messages for selection board requirements. "Received NLT" dates are not waiverable by anyone in the evaluations office.

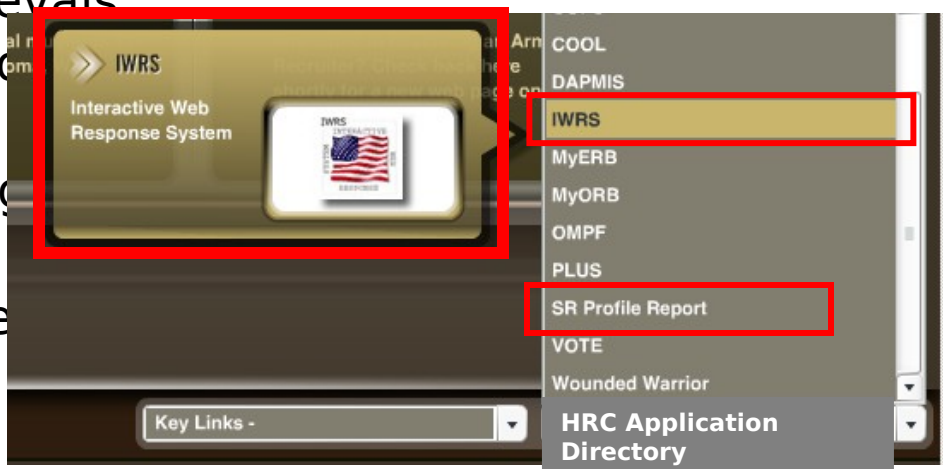
Key Elements for Effective Evaluation Systems

Goal: develop and assess Soldiers; submit reports on time.

Senior Rater's Role – do or ensure:

- Ensure rating schemes are known by Soldiers
- Oversee counseling; participate in counseling
- Use tools & My Forms (red outlines)
- Know current THRU dates of reports on file
- Anticipate and project "next" evals.
  - Current thru date on file plus 12 month or known changes of rater.
  - Complete the record dates for those being considered by a selection.
- Notify rating officials of upcoming evals
- Track rating officials counseling and reports (use My Forms)
- Follow up on receipt and processing at HRC (using tools)
- Take appropriate action with proble rating officials as necessary.





HRC Website: https://www.hrc.army.mil

Senior Rater Evaluation Timeliness Report

FOR USE OF THIS FORM SEE AR 623-3; PROPONENT AGENCY IS ACofS, G-1

NAME:	SSN:	RANK:	CREATED DATE:
JONES, CARLOS W.	888888888	BG	20060201

RO Rank	# Reports Submitted	# Reports On Time	% Reports On Time
MG	0	0	0
BG	0	0	0
COL	200	200	100%
LTC	400	200	50%
MAJ	50	47	94%
CPT	100	10	10%
1LT	100	90	90%
2LT	100	50	50%
CW5	0	0	0
CW4	0	0	0
CW3	0	0	0
CW2	0	0	0
WO1	0	0	0
Total for OER	950	597	62%
SGM	Tbd	Tbd	Tbd
MSG	Tbd	Tbd	Tbd
SFC	Tbd	Tbd	Tbd
SSG	Tbd	Tbd	Tbd
SGT	Tbd	Tbd	Tbd
Total for NCOER	TBD	TBD	TBD
Total for Evals	950	597	62%

DA Form 67-9-2A, 15 May 2006

CREATE EXCEL SPREADSHEET

Notes:

1. On-time calculations for OER & NCOER are based on reports being received at HQDA within 90 days after THRU date, regardless of component.

2. When available, NCOER information covers Active and USAR reports. ARNG NCOER are kept at State level.

3. Senior rater can view details on the late reports by selecting a specific rank.

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h

As of: 7 Apr 08

FOR OFFICIAL USE ONLY

Senior Rater Evaluation Timeliness Report

FOR USE OF THIS FORM SEE AR 623-3; PROPONENT AGENCY IS ACofS, G-1

NAME:	SSN:	RANK:	CREATED DATE:
JONES, CARLOS W.	888888888	BG	20060201

Late Reports For This Senior Rater and This Rank

RO Rank	# Reports Submitted	# Reports On Time	Reports Late	% Reports On Time
MAJ	50	47	3	94%

Rank	RO Name	Report Thru Date	Date at HQDA	1-30 days late	31-60 days late	61-90 days late	over 90 days	Current Status
MAJ	Ortiz, Renee	20050101	20050501		x			completed
MAJ	Byers, Sam	20041003	20051003				x	complete
MAJ	Green, Tobias	20030101	20050202				x	completed
Total for this SR	**-**	**-**	**-**	**0**	**1**	**0**	**2**	

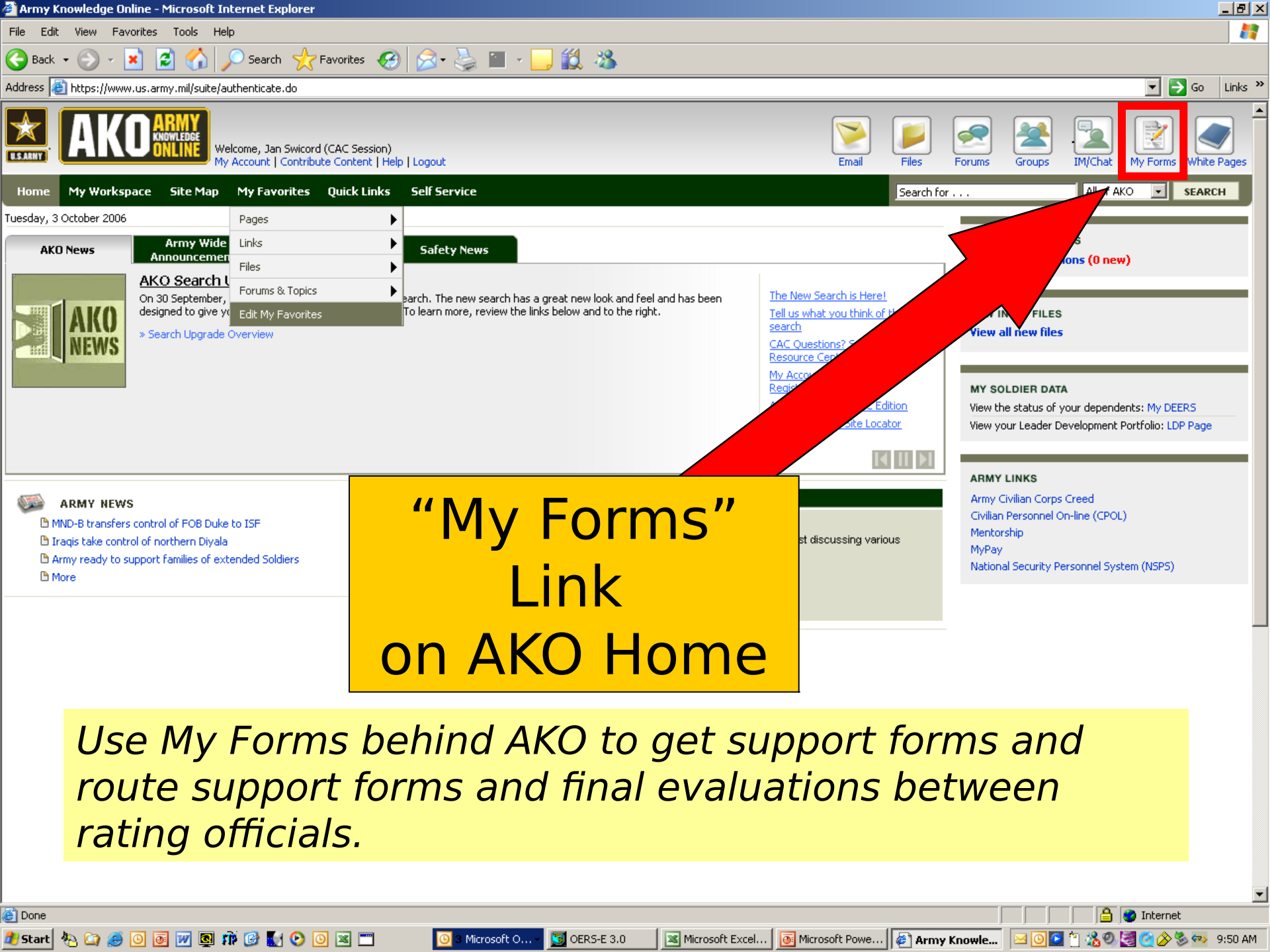
Details for late reports shown as part of the Senior Rater Evaluation Timeliness Report

Specifics for the late Major's reports.

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08

Processing a Military Evaluation:

- Subsequent slides lay out a method of using My Forms with OER and NCOER processing. The first two, after this next slide, are best printed and viewed – they are very difficult to read on screen.
- There are other ways to execute this processing but this is a good start for most units.
- Using My Forms for all actions reduces the possibility of errors and provides the greatest amount of tracking and administrative coverage for HR managers.
- The technology described here includes a set of tools – it is not designed to replace the very necessary and important human interaction required (and desired) between rating officials and rated Soldiers. Tools guide right behavior but are flexible to meet a variety of needs at local levels
- It all starts with the support form and counseling.



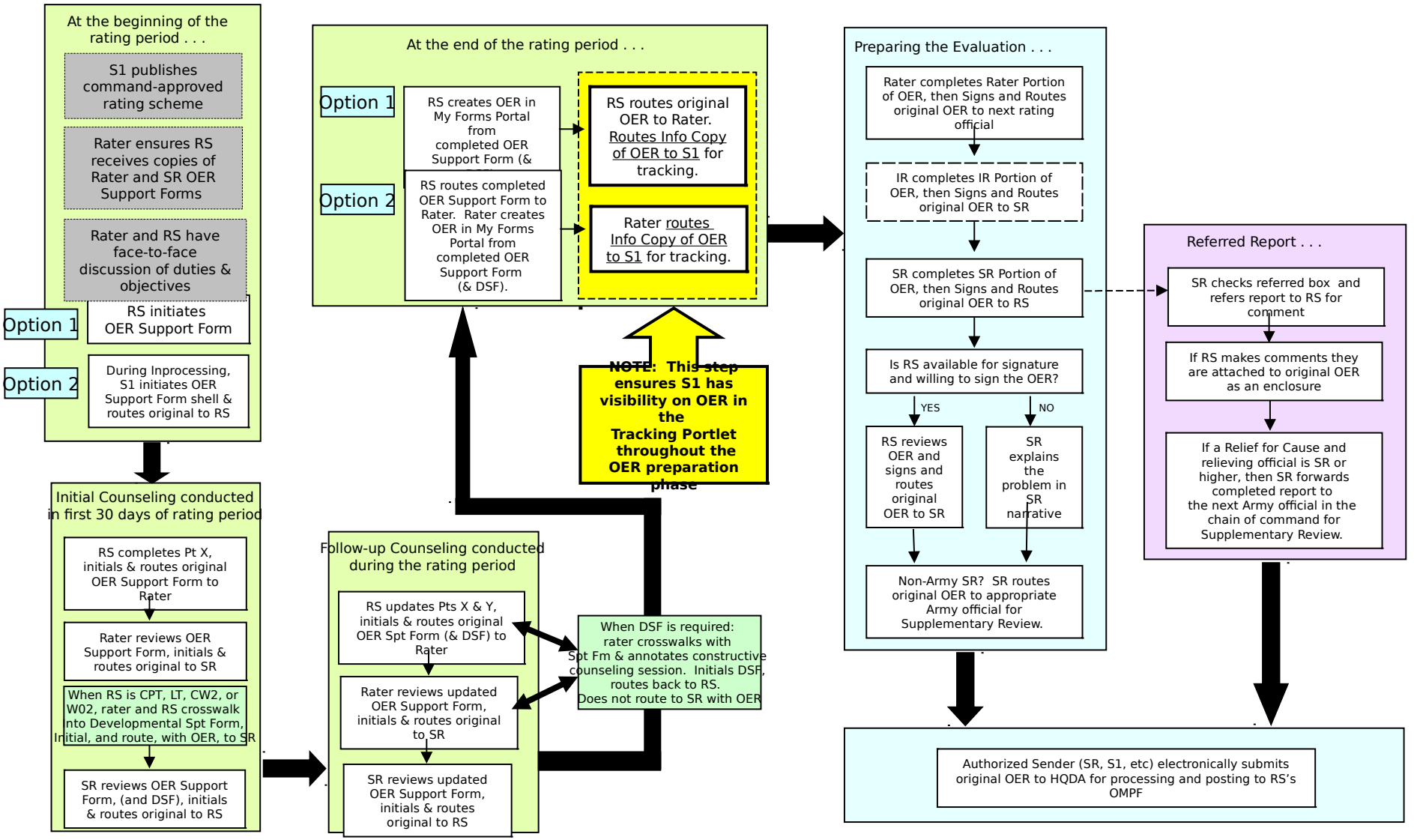
Use My Forms behind AKO to get support forms and route support forms and final evaluations between rating officials.

AKO My Forms Portal
valuations Business Process - Officers

LEGEND

RS Rated Soldier
IR Intermediate Rater
SR Senior Rater

Action in My Forms Portal
Action offline


At the beginning of the rating period . . .
S1 publishes command-approved rating scheme
Rater ensures RS receives copies of Rater and SR OER Support Forms
Rater and RS have face-to-face discussion of duties & objectives
Option 1
RS initiates OER Support Form
Option 2
During Inprocessing, S1 initiates OER Support Form shell & routes original to RS
Initial Counseling conducted in first 30 days of rating period
RS completes Pt X, initials & routes original OER Support Form to Rater
Rater reviews OER Support Form, initials & routes original to SR
When RS is CPT, LT, CW2, or W02, rater and RS crosswalk into Developmental Spt Form, Initial, and route, with OER, to SR
SR reviews OER Support Form, (and DSF), initials & routes original to RS
Follow-up Counseling conducted during the rating period
RS updates Pts X & Y, initials & routes original OER Spt Form (& DSF) to Rater
Rater reviews updated OER Support Form, initials & routes original to SR
SR reviews updated OER Support Form, initials & routes original to RS
When DSF is required: rater crosswalks with Spt Fm & annotates constructive counseling session. Initials DSF, routes back to RS. Does not route to SR with OER
At the end of the rating period . . .
Option 1
RS creates OER in My Forms Portal from completed OER Support Form (&
Option 2
RS routes completed OER Support Form to Rater. Rater creates OER in My Forms Portal from completed OER Support Form (& DSF).
RS routes original OER to Rater. Routes Info Copy of OER to S1 for tracking.
Rater routes Info Copy of OER to S1 for tracking.
NOTE: This step ensures S1 has visibility on OER in the Tracking Portlet throughout the OER preparation phase
Preparing the Evaluation . . .
Rater completes Rater Portion of OER, then Signs and Routes original OER to next rating official
IR completes IR Portion of OER, then Signs and Routes original OER to SR
SR completes SR Portion of OER, then Signs and Routes original OER to RS
Is RS available for signature and willing to sign the OER?
YES
NO
RS reviews OER and signs and routes original OER to SR
SR explains the problem in SR narrative
Non-Army SR? SR routes original OER to appropriate Army official for Supplementary Review.
Referred Report . . .
SR checks referred box and refers report to RS for comment
If RS makes comments they are attached to original OER as an enclosure
If a Relief for Cause and relieving official is SR or higher, then SR forwards completed report to the next Army official in the chain of command for Supplementary Review.
Authorized Sender (SR, S1, etc) electronically submits original OER to HQDA for processing and posting to RS's OMPF

S1 tracks OER status using Tracking Portlet in AKO My Forms Portal.

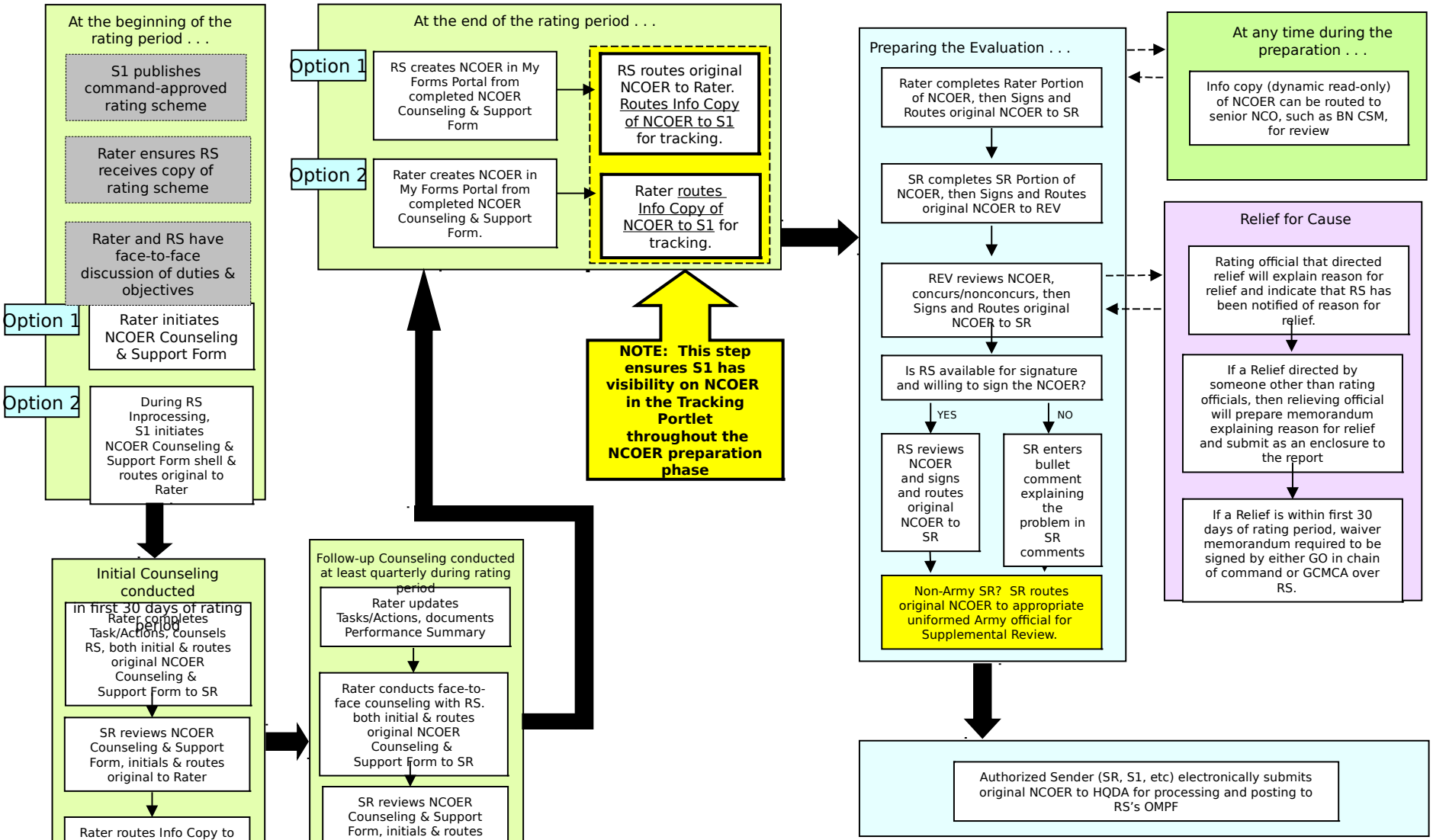
As of: 7 Apr 08

AKO My Forms Portal
Evaluations Business Process - NCOs

LEGEND

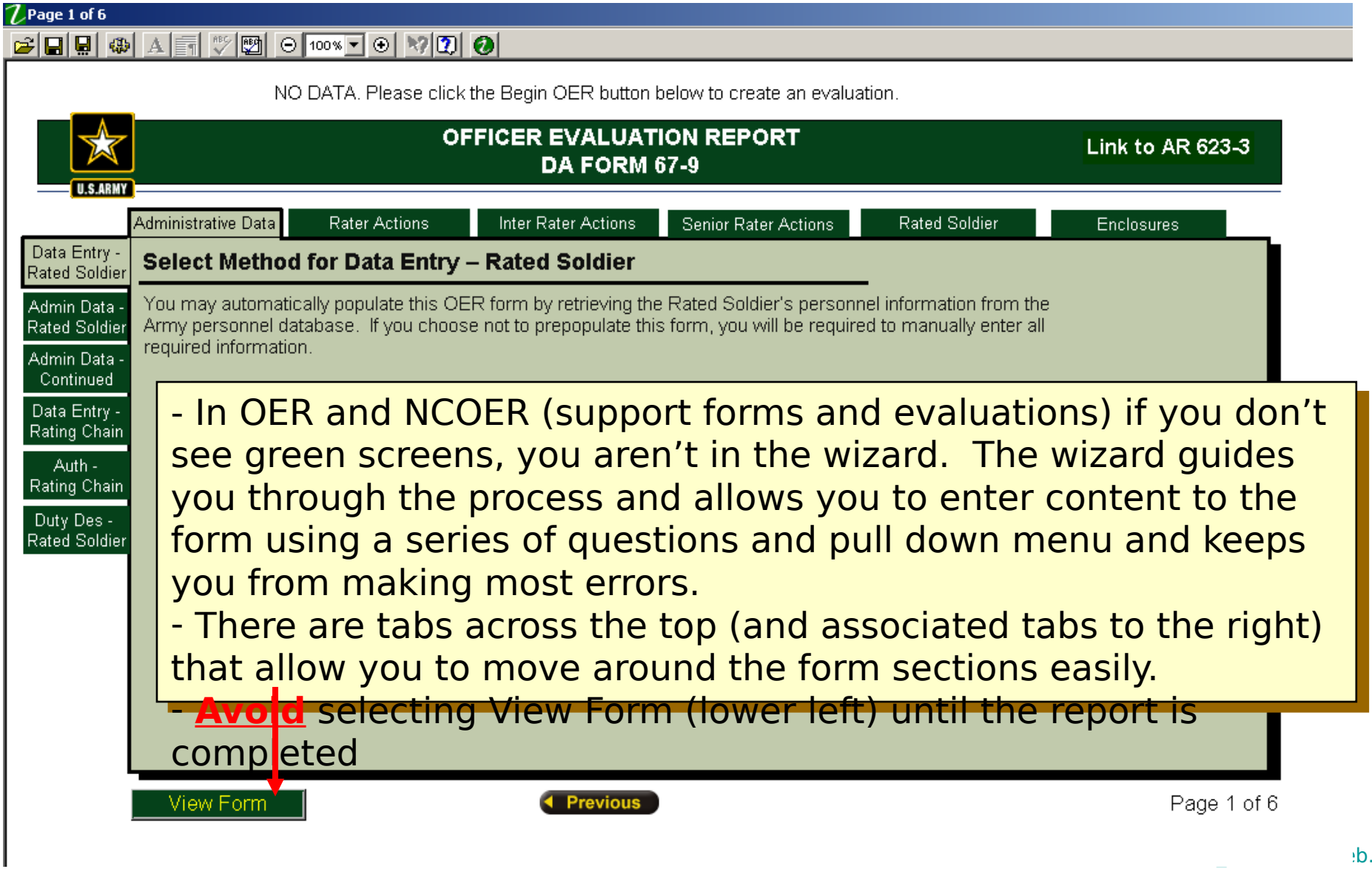
RS Rated Soldier
SR Senior Rater
REV Reviewer

Action in My Forms Portal
Action offline


At the beginning of the rating period . . .
S1 publishes command-approved rating scheme
Rater ensures RS receives copy of rating scheme
Rater and RS have face-to-face discussion of duties & objectives
Option 1
Rater initiates NCOER Counseling & Support Form
Option 2
During RS Inprocessing, S1 initiates NCOER Counseling & Support Form shell & routes original to Rater
Initial Counseling conducted in first 30 days of rating period
Rater completes Task/Actions, counsels RS, both initial & routes original NCOER Counseling & Support Form to SR
SR reviews NCOER Counseling & Support Form, initials & routes original to Rater
Rater routes Info Copy to RS for his file
Follow-up Counseling conducted at least quarterly during rating period
Rater updates Tasks/Actions, documents Performance Summary
Rater conducts face-to-face counseling with RS. both initial & routes original NCOER Counseling & Support Form to SR
SR reviews NCOER Counseling & Support Form, initials & routes original to Rater
At the end of the rating period . . .
Option 1
RS creates NCOER in My Forms Portal from completed NCOER Counseling & Support Form
RS routes original NCOER to Rater. Routes Info Copy of NCOER to S1 for tracking.
Option 2
Rater creates NCOER in My Forms Portal from completed NCOER Counseling & Support Form.
Rater routes Info Copy of NCOER to S1 for tracking.
NOTE: This step ensures S1 has visibility on NCOER in the Tracking Portlet throughout the NCOER preparation phase
Preparing the Evaluation . . .
Rater completes Rater Portion of NCOER, then Signs and Routes original NCOER to SR
SR completes SR Portion of NCOER, then Signs and Routes original NCOER to REV
REV reviews NCOER, concurs/nonconcurs, then Signs and Routes original NCOER to SR
Is RS available for signature and willing to sign the NCOER?
YES
NO
RS reviews NCOER and signs and routes original NCOER to SR
SR enters bullet comment explaining the problem in SR comments
Non-Army SR? SR routes original NCOER to appropriate uniformed Army official for Supplemental Review.
At any time during the preparation . . .
Info copy (dynamic read-only) of NCOER can be routed to senior NCO, such as BN CSM, for review
Relief for Cause
Rating official that directed relief will explain reason for relief and indicate that RS has been notified of reason for relief.
If a Relief directed by someone other than rating officials, then relieving official will prepare memorandum explaining reason for relief and submit as an enclosure to the report
If a Relief is within first 30 days of rating period, waiver memorandum required to be signed by either GO in chain of command or GCMCA over RS.
Authorized Sender (SR, S1, etc) electronically submits original NCOER to HQDA for processing and posting to RS's OMPF

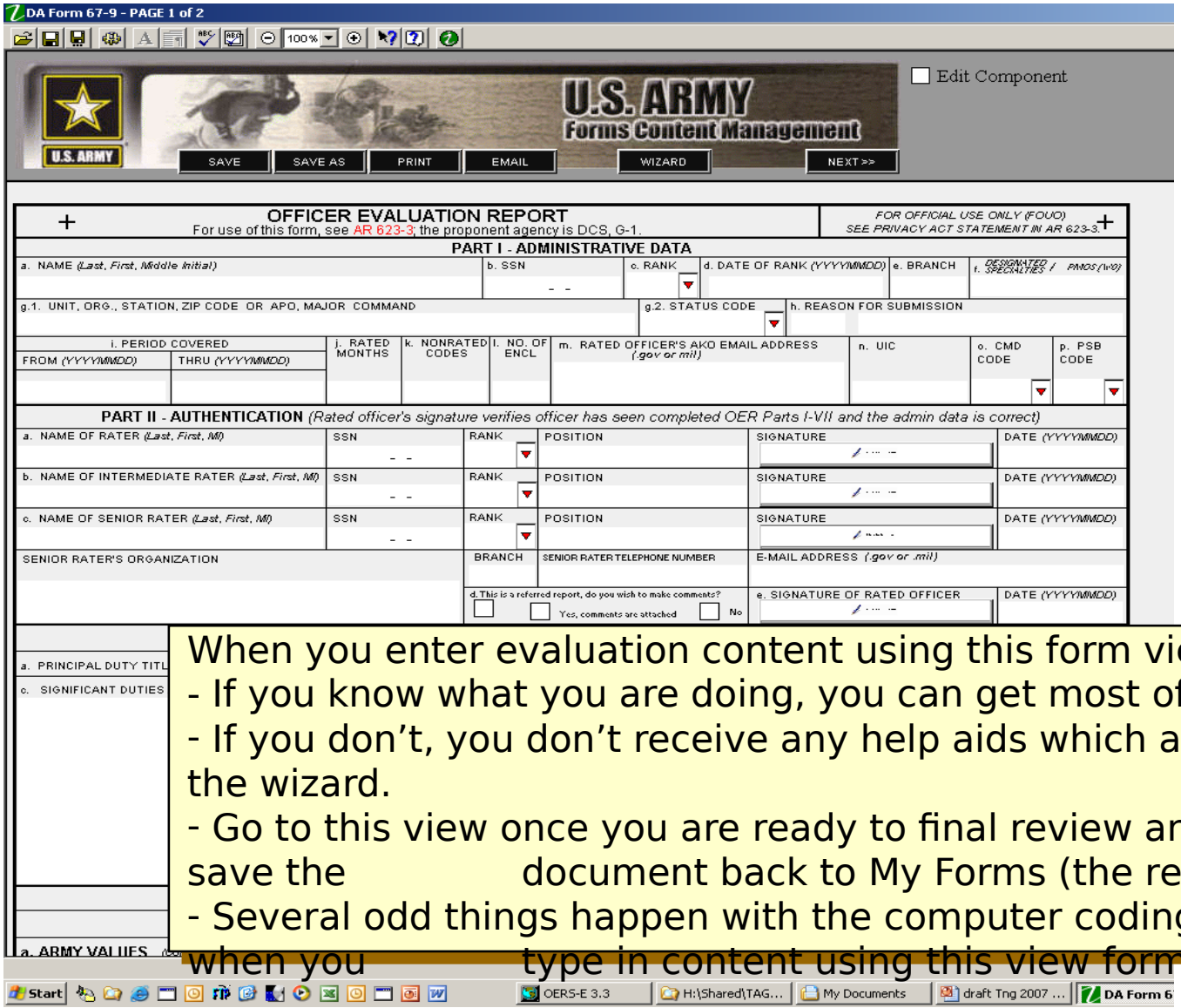
S1 tracks NCOER status using Tracking Portlet in AKO My Forms Portal.

This is an evaluation wizard form …


Page 1 of 6
100%
NO DATA. Please click the Begin OER button below to create an evaluation.
U.S.ARMY
OFFICER EVALUATION REPORT
DA FORM 67-9
Link to AR 623-3
Administrative Data
Rater Actions
Inter Rater Actions
Senior Rater Actions
Rated Soldier
Enclosures
Data Entry - Rated Soldier
Admin Data - Rated Soldier
Admin Data - Continued
Data Entry - Rating Chain
Auth - Rating Chain
Duty Des - Rated Soldier
Select Method for Data Entry – Rated Soldier
You may automatically populate this OER form by retrieving the Rated Soldier's personnel information from the Army personnel database. If you choose not to prepopulate this form, you will be required to manually enter all required information.
View Form
Previous
Page 1 of 6

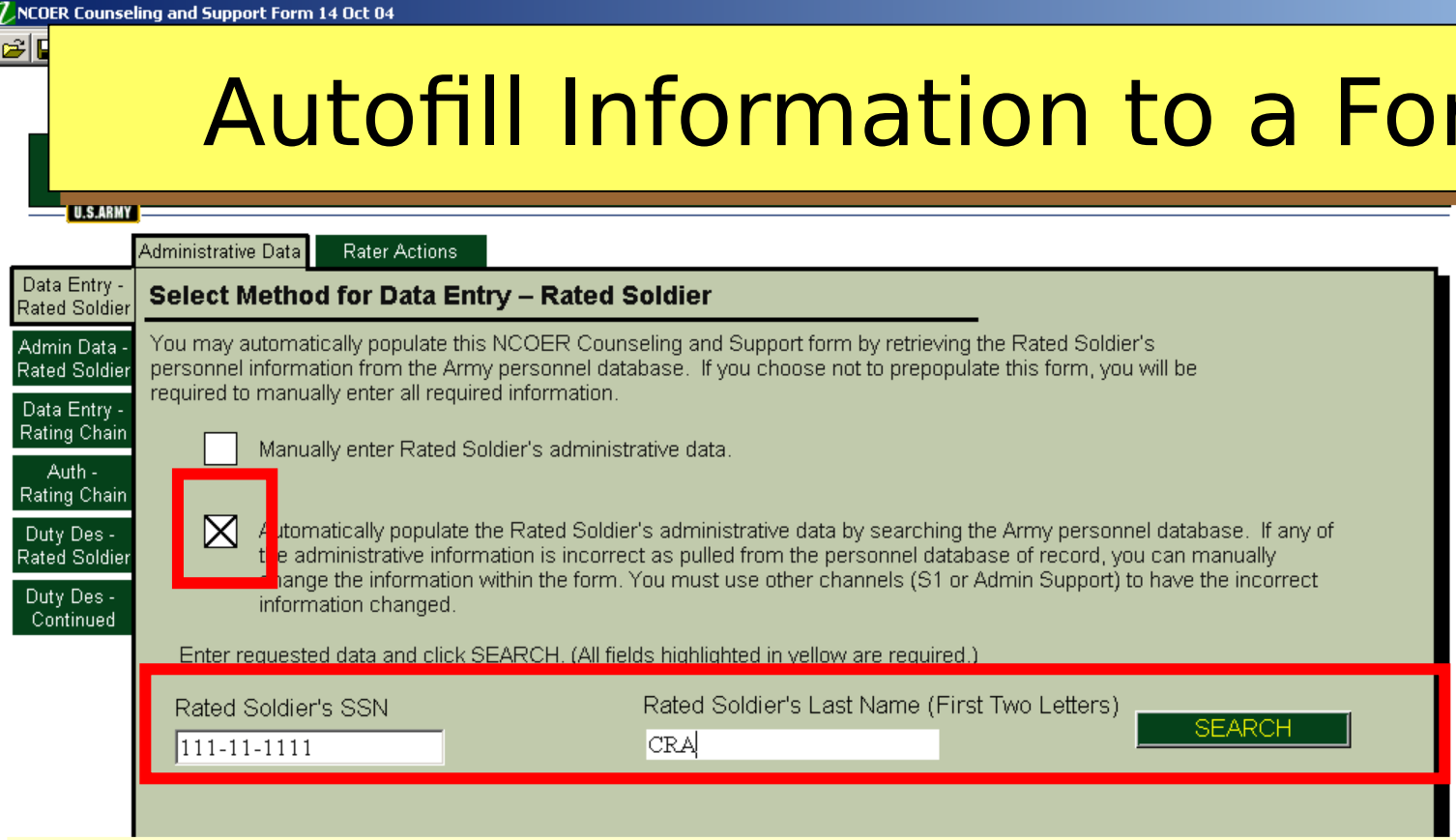
- In OER and NCOER (support forms and evaluations) if you don't see green screens, you aren't in the wizard. The wizard guides you through the process and allows you to enter content to the form using a series of questions and pull down menu and keeps you from making most errors.
- There are tabs across the top (and associated tabs to the right) that allow you to move around the form sections easily.
- **Avoid** selecting View Form (lower left) until the report is completed

Don’t hit “VIEW FORM” and start typing …


DA Form 67-9 - PAGE 1 of 2
U.S. ARMY
Forms Content Management
Edit Component
SAVE
SAVE AS
PRINT
EMAIL
WIZARD
NEXT >>
OFFICER EVALUATION REPORT
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.
FOR OFFICIAL USE ONLY (FOUO)
SEE PRIVACY ACT STATEMENT IN AR 623-3.
PART I - ADMINISTRATIVE DATA
PART II - AUTHENTICATION (Rated officer's signature verifies officer has seen completed OER Parts I-VII and the admin data is correct)
SENIOR RATER'S ORGANIZATION
a. PRINCIPAL DUTY TITL
c. SIGNIFICANT DUTIES
a. ARMY VALUES

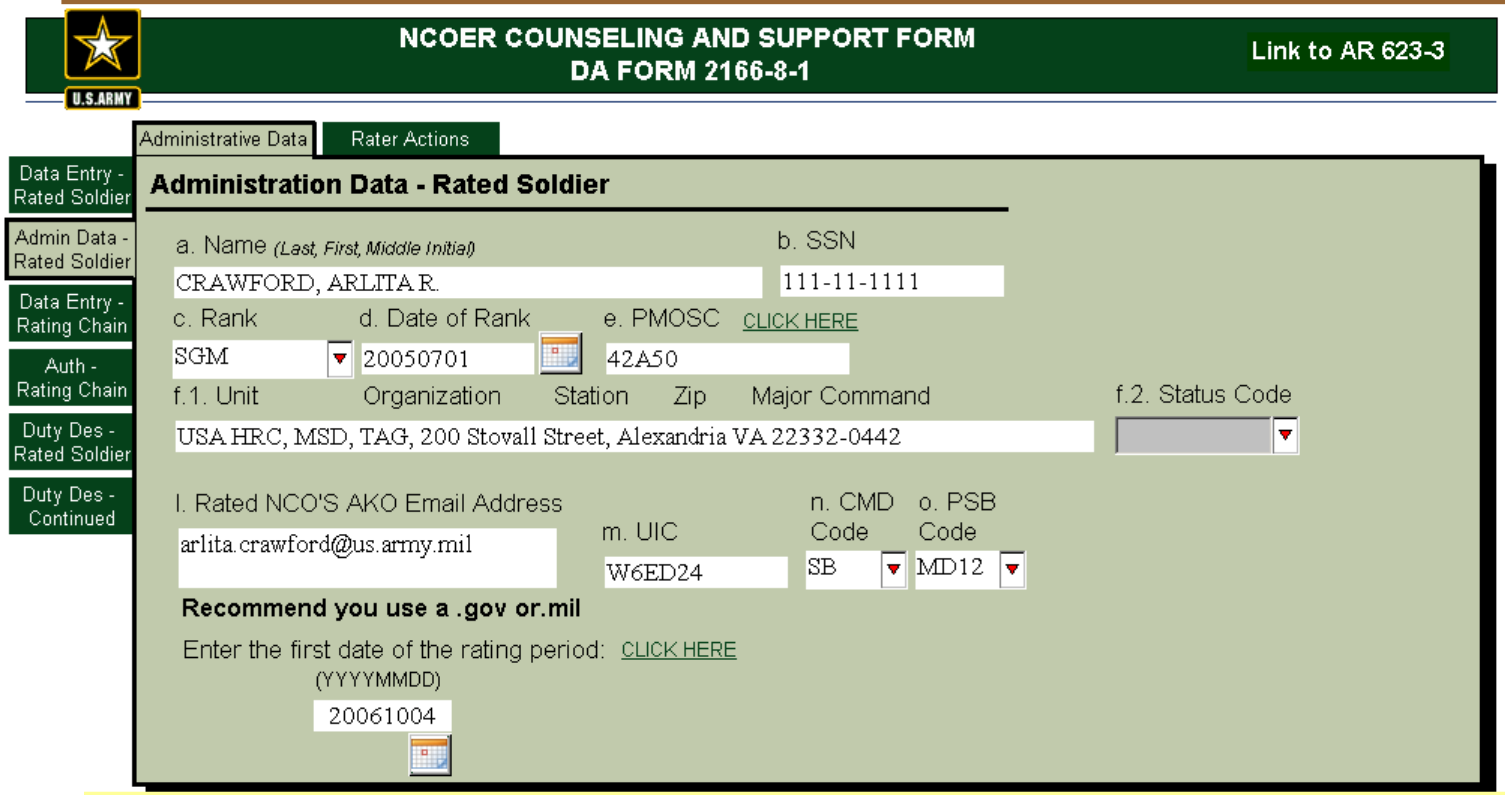
When you enter evaluation content using this form view:
- If you know what you are doing, you can get most of it correct.
- If you don’t, you don’t receive any help aids which are embedded in the wizard.
- Go to this view once you are ready to final review and digitally sign or save the document back to My Forms (the repository).
- Several odd things happen with the computer coding and help buttons when you type in content using this view format. Use the wizard.

Autofill Information to a Form:


NCOER Counseling and Support Form 14 Oct 04
U.S.ARMY
Administrative Data
Rater Actions
Data Entry - Rated Soldier
Admin Data - Rated Soldier
Data Entry - Rating Chain
Auth - Rating Chain
Duty Des - Rated Soldier
Duty Des - Continued
Select Method for Data Entry – Rated Soldier
You may automatically populate this NCOER Counseling and Support form by retrieving the Rated Soldier's personnel information from the Army personnel database. If you choose not to prepopulate this form, you will be required to manually enter all required information.
Manually enter Rated Soldier's administrative data.
Automatically populate the Rated Soldier's administrative data by searching the Army personnel database. If any of the administrative information is incorrect as pulled from the personnel database of record, you can manually change the information within the form. You must use other channels (S1 or Admin Support) to have the incorrect information changed.
Enter requested data and click SEARCH. (All fields highlighted in yellow are required.)
Rated Soldier's SSN
111-11-1111
Rated Soldier's Last Name (First Two Letters)
CRA
SEARCH

Once inside a wizard form, select the automatically populate box
Add a SSN and at least the first 2 letters of the last name. Hit S
No demo for these slides as it doesn't work for a fake SSN. This
information from ITAPDB. If the pull doesn't work – check the SS
and retry. If it still doesn't work, manually enter information.

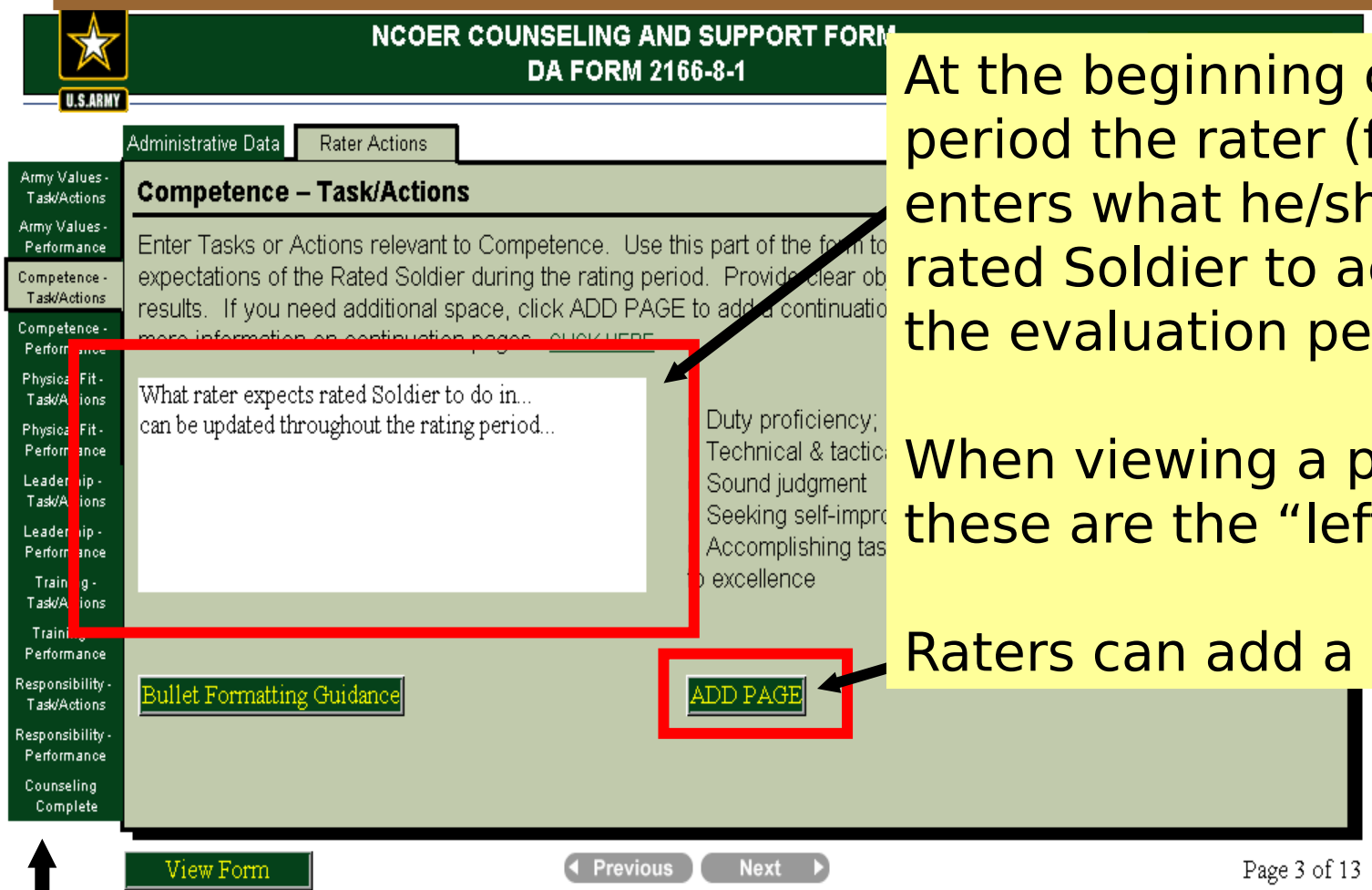
Autofill Information to a Form:



Info pulled from ITAPDB can be updated if it is not correct. Usually, unit information needs to be cleaned up to make it le

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08

Complete NCOER Counseling:



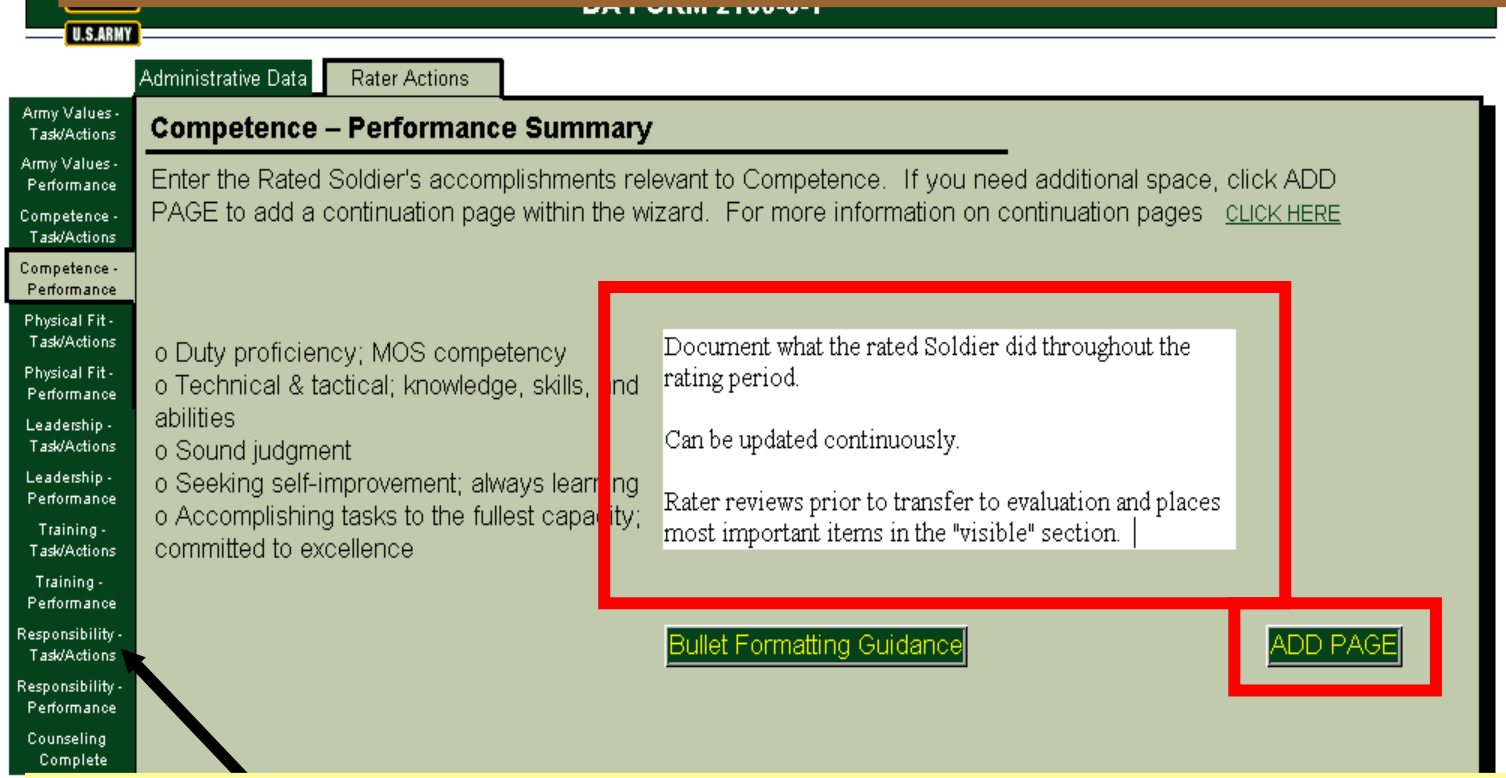
At the beginning of an evaluati
period the rater (for an NCO)
enters what he/she expects the
rated Soldier to accomplish dur
the evaluation period.

When viewing a printed page
these are the “left column” bloc

Raters can add a page if neede

Task/Action tabs alternate with performance tabs along left edge.

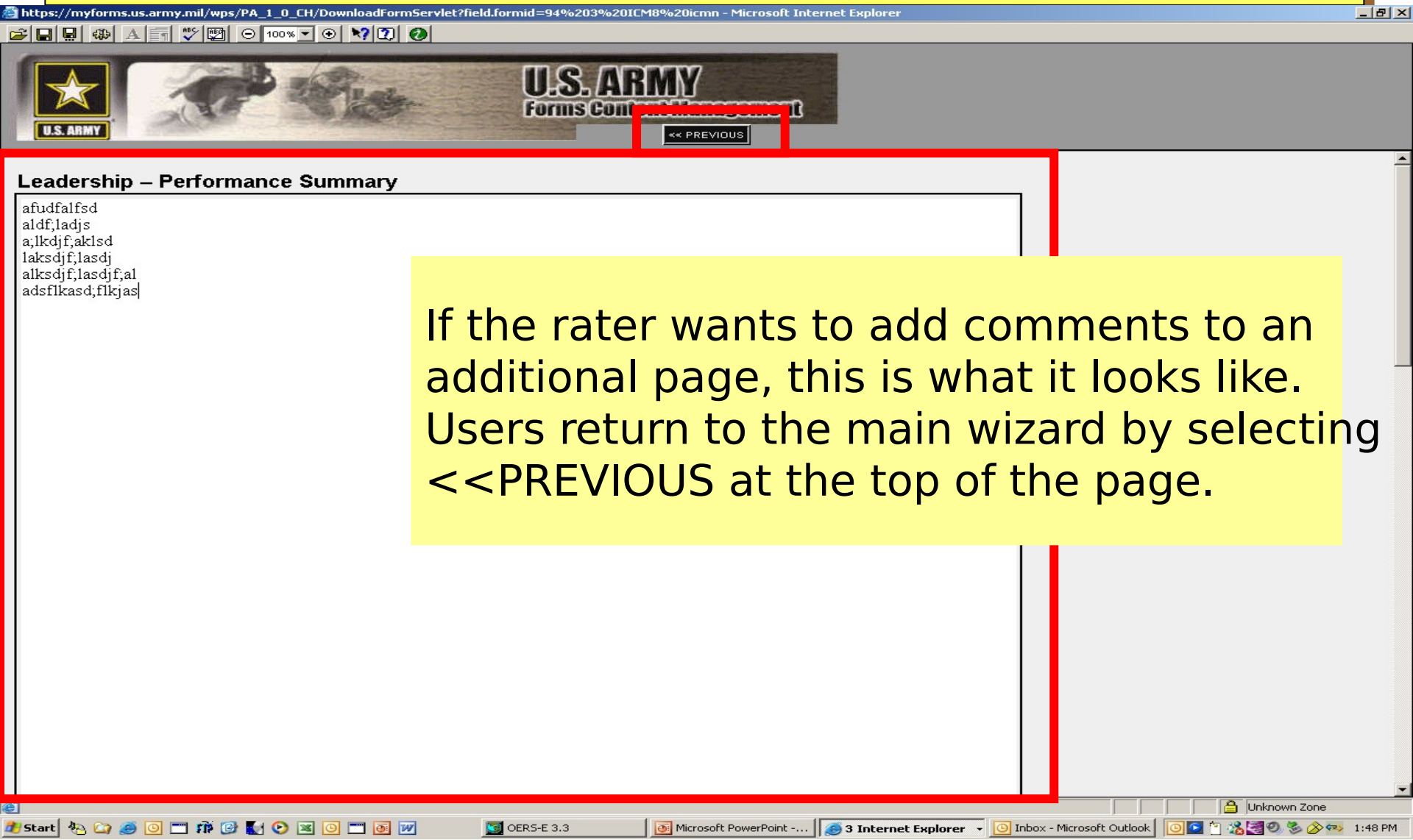
Complete NCOER Counseling:


U.S.ARMY
Administrative Data
Rater Actions
Army Values - Task/Actions
Army Values - Performance
Competence - Task/Actions
Competence - Performance
Physical Fit - Task/Actions
Physical Fit - Performance
Leadership - Task/Actions
Leadership - Performance
Training - Task/Actions
Training - Performance
Responsibility - Task/Actions
Responsibility - Performance
Counseling Complete
Competence – Performance Summary
Enter the Rated Soldier's accomplishments relevant to Competence. If you need additional space, click ADD PAGE to add a continuation page within the wizard. For more information on continuation pages CLICK HERE
o Duty proficiency; MOS competency
o Technical & tactical; knowledge, skills, nd abilities
o Sound judgment
o Seeking self-improvement; always learn ng
o Accomplishing tasks to the fullest capa ity; committed to excellence
Document what the rated Soldier did throughout the rating period.
Can be updated continuously.
Rater reviews prior to transfer to evaluation and places most important items in the "visible" section.
Bullet Formatting Guidance
ADD PAGE

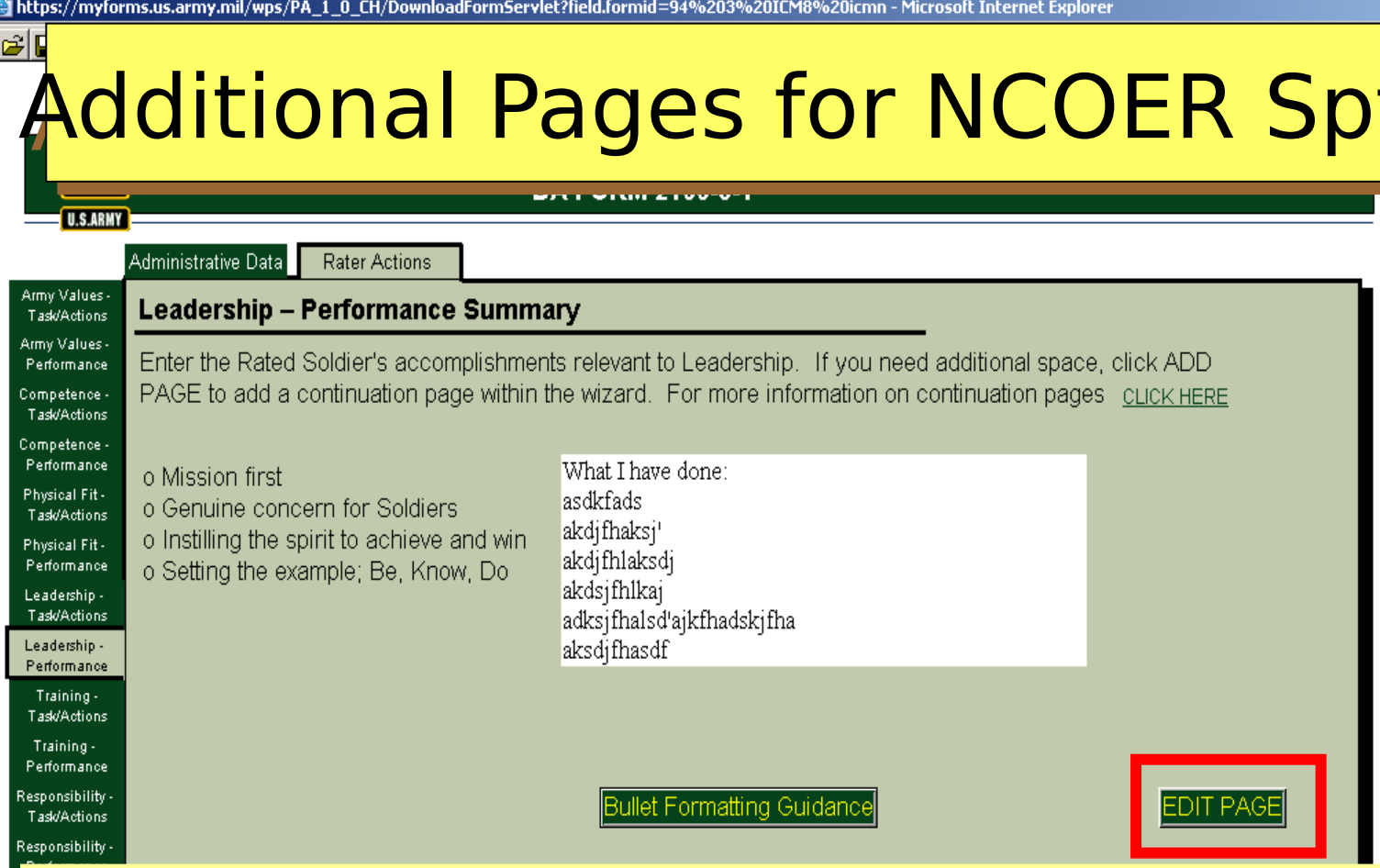
At least quarterly throughout & at the end of an evaluation peri
(for an NCO) enters what the rated Soldier accomplished during
the evaluation period. Raters can add a page if needed.

Performance sections alternate with Tasks/Action tabs on left.

Additional Pages for NCOER Spt Form:



Additional Pages for NCOER Spt Form:


https://myforms.us.army.mil/wps/PA_1_0_CH/DownloadFormServlet?field.formid=94%203%20ICM8%20icmn - Microsoft Internet Explorer
U.S.ARMY
Administrative Data
Rater Actions
Army Values - Task/Actions
Army Values - Performance
Competence - Task/Actions
Competence - Performance
Physical Fit - Task/Actions
Physical Fit - Performance
Leadership - Task/Actions
Leadership - Performance
Training - Task/Actions
Training - Performance
Responsibility - Task/Actions
Leadership – Performance Summary
Enter the Rated Soldier's accomplishments relevant to Leadership. If you need additional space, click ADD PAGE to add a continuation page within the wizard. For more information on continuation pages CLICK HERE
o Mission first
o Genuine concern for Soldiers
o Instilling the spirit to achieve and win
o Setting the example; Be, Know, Do
What I have done:
asdkfads
akdjfhaksj'
akdjfhlaksdj
akdsjfhlkaj
adksjfhalsd'ajkfhadskjfha
aksdjfhasdf
Bullet Formatting Guidance
EDIT PAGE

After adding comments to an additional page and returning to t
Wizard form, the user no longer sees an option to add a page.
function box now reflects an option to EDIT PAGE.
Should you see EDIT PAGE, you know there is an additional page of information.

Complete NCOER Counseling:

DA Form 2166-8-1 PAGE 1 of 2

NCOER COUNSELING AND SUPPORT FORM
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.

FOR OFFICIAL USE ONLY (FOUO)
SEE PRIVACY ACT STATEMENT IN AR 623-3.

PART I - ADMINISTRATIVE DATA

a. NAME (Last, First, Middle Initial)	b. SSN	c. RANK	d. DATE OF RANK	e. PMOSC
CRAWFORD, ARLITA R.	111-11-1111	SGM	20050701	42A50

f. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND	STATUS CODE	l. RATED NCO'S EMAIL ADDRESS (.gov or .mil)	m. UIC	n. CMD CODE	o. PSB CODE
USA HRC, MSD, TAG, 200 Stovall Street, Alexandria VA 22332-0442		[illegible]	W6ED24	SB	MD12

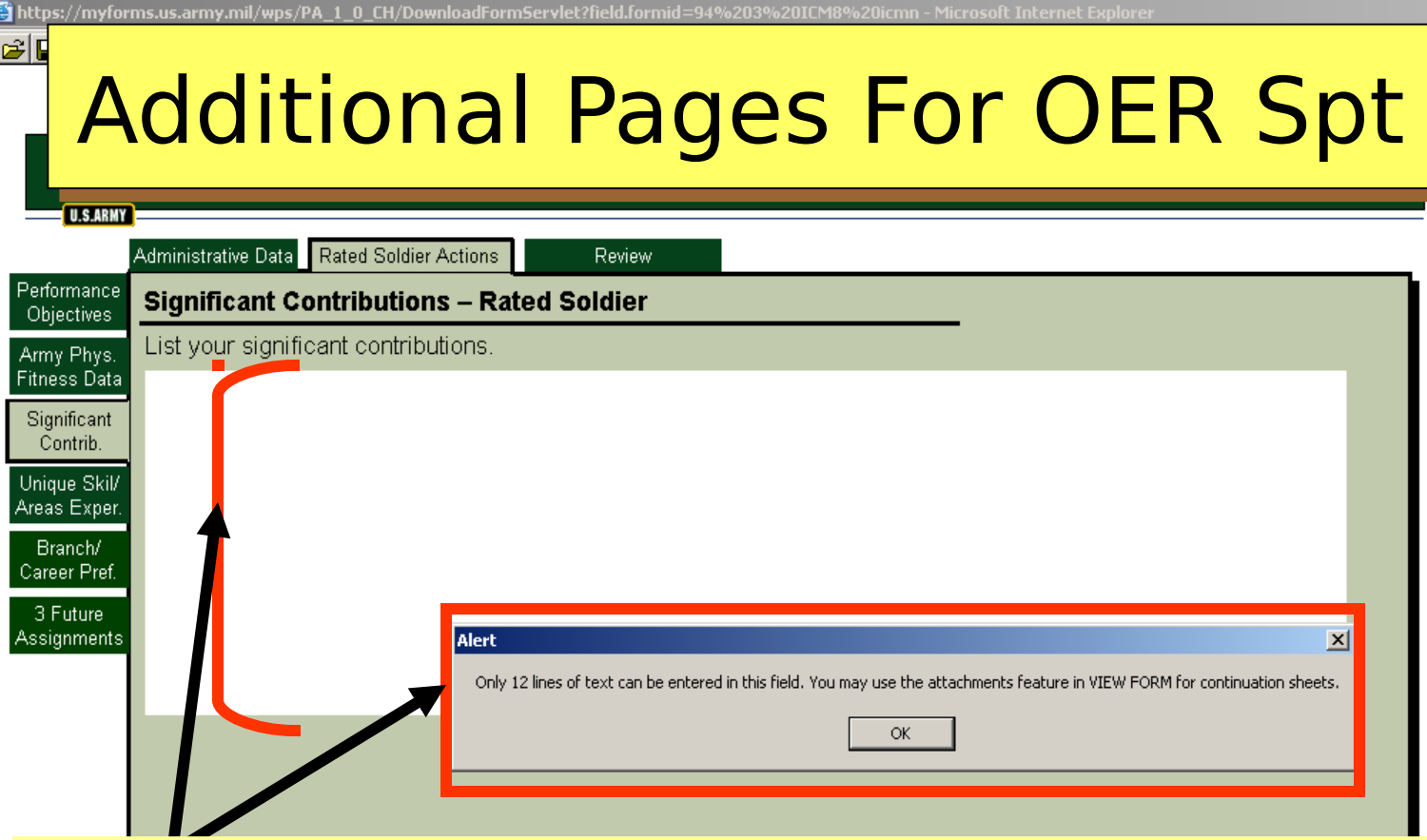
PART II - AUTHENTICATION

a. NAME OF RATER (Last, First, Middle Initial)	SSN	INITIAL	LATER	LATER	LATER
SWICORD, JAN T.	222-22-22[illegible]2	20061016	20070118		
RANK, PMOSC/BRANCH, ORGANIZATION, DUTY ASSIGNMENT		RATER'S AKO EMAIL ADDRESS (.gov. or .mil)			
GS-14, ESO, MSD, TAGD, USA HRC Alex VA, Chief, Eval Systems Office		jan.swicord@us.army.mil			
b. NAME OF SENIOR RATER (Last, First, Middle Initial)	SSN	INITIAL	LATER	LATER	LATER
PICCIRILLI, GEORGE J.	333-33-33[illegible]3	20070119	20070119		
RANK, PMOSC/BRANCH, ORGANIZATION, DUTY ASSIGNMENT		SENIOR RATER'S AKO EMAIL ADDRESS (.gov. or .mil)			
GS-15, MSD, TAGD, USA HRC, Alex VA, Chief, Management Support Division		george-piccirilli@us.army.mil			
c. NAME OF REVIEWER (Last, First, Middle Initial)	SSN	INITIAL	LATER	LATER	LATER
JONES, REUBEN	444-44-44[illegible]4				
RANK, PMOSC/BRANCH, ORGANIZATION, DUTY ASSIGNMENT		REVIEWER'S AKO EMAIL ADDRESS (.gov. or .mil)			
COL(P), TAG, USA HRC Alexandria VA, The Adjutant General		reuben.jones@us.army.mil			
d. RATED NCO's INITIAL's		INITIAL	LATER	LATER	LATER
		20061019	20070119		

Admin Note: these dates are for demo purposes only.

With counseling completed rating officials and rated Soldier can CAC sign/initial the form. You don't have to counsel sitting next to a computer. Discuss performance and potential in a reasonable setting and individuals physically sign the form at the first opportunity thereafter. If there are problems getting to a computer, the rater can make notes internal to the form. Discussions about expectations and performance are important.

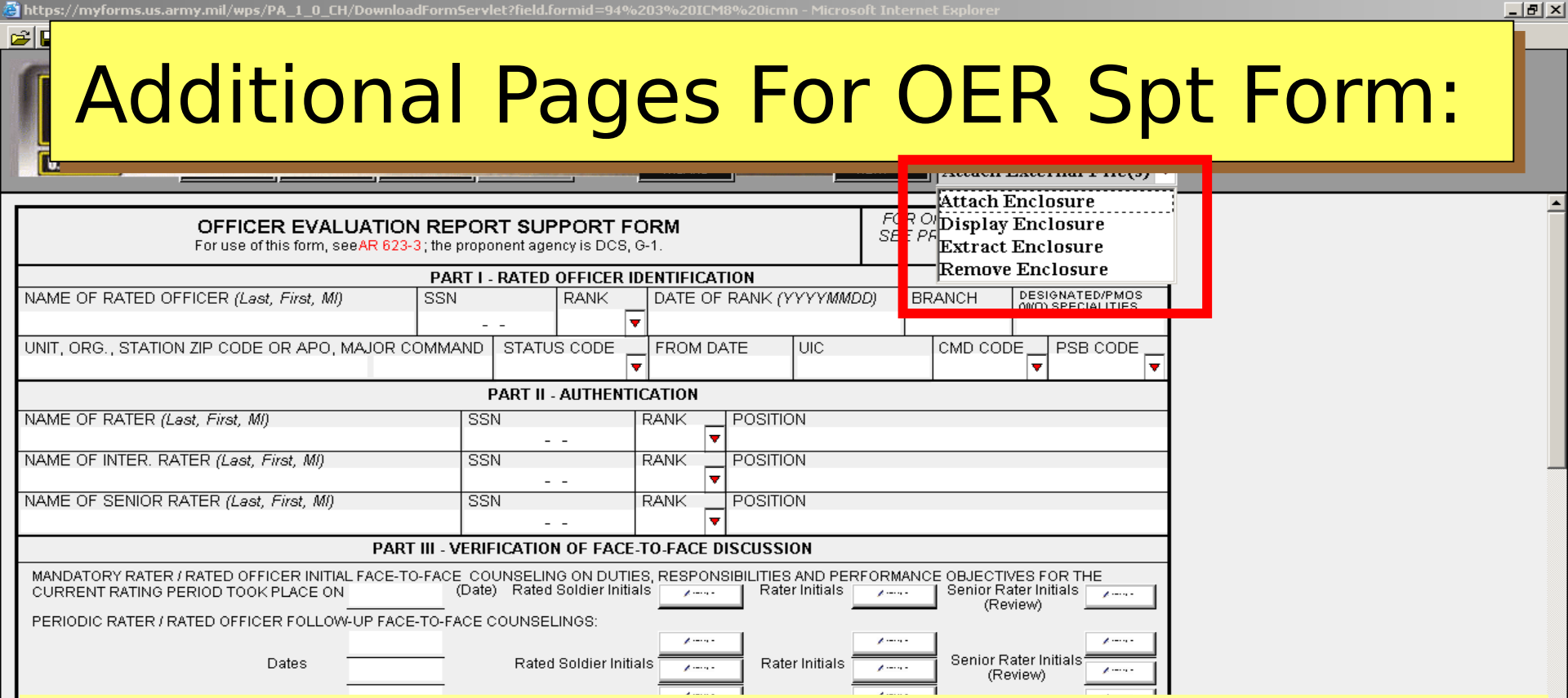
Additional Pages For OER Spt Form:


https://myforms.us.army.mil/wps/PA_1_0_CH/DownloadFormServlet?field.formid=94%203%20ICM8%20icmn - Microsoft Internet Explorer
U.S.ARMY
Administrative Data
Rated Soldier Actions
Review
Performance Objectives
Army Phys. Fitness Data
Significant Contrib.
Unique Skil/ Areas Exper.
Branch/ Career Pref.
3 Future Assignments
Significant Contributions – Rated Soldier
List your significant contributions.
Alert
Only 12 lines of text can be entered in this field. You may use the attachments feature in VIEW FORM for continuation sheets.
OK

OER support forms limit text but allows for attachments to document rated officer's accomplishments. Only text visible on the support form itself will transfer to the evaluation automatically. As the support form should accompany the final evaluation during it's preparation the rating officials should review the support form in its entirety (to include the attached pages) to glean relevant information for the final assessment.

FYI: We deliberately limited the space on the support form to that which is available on a final evaluation so this transfer action would not randomly truncate information.

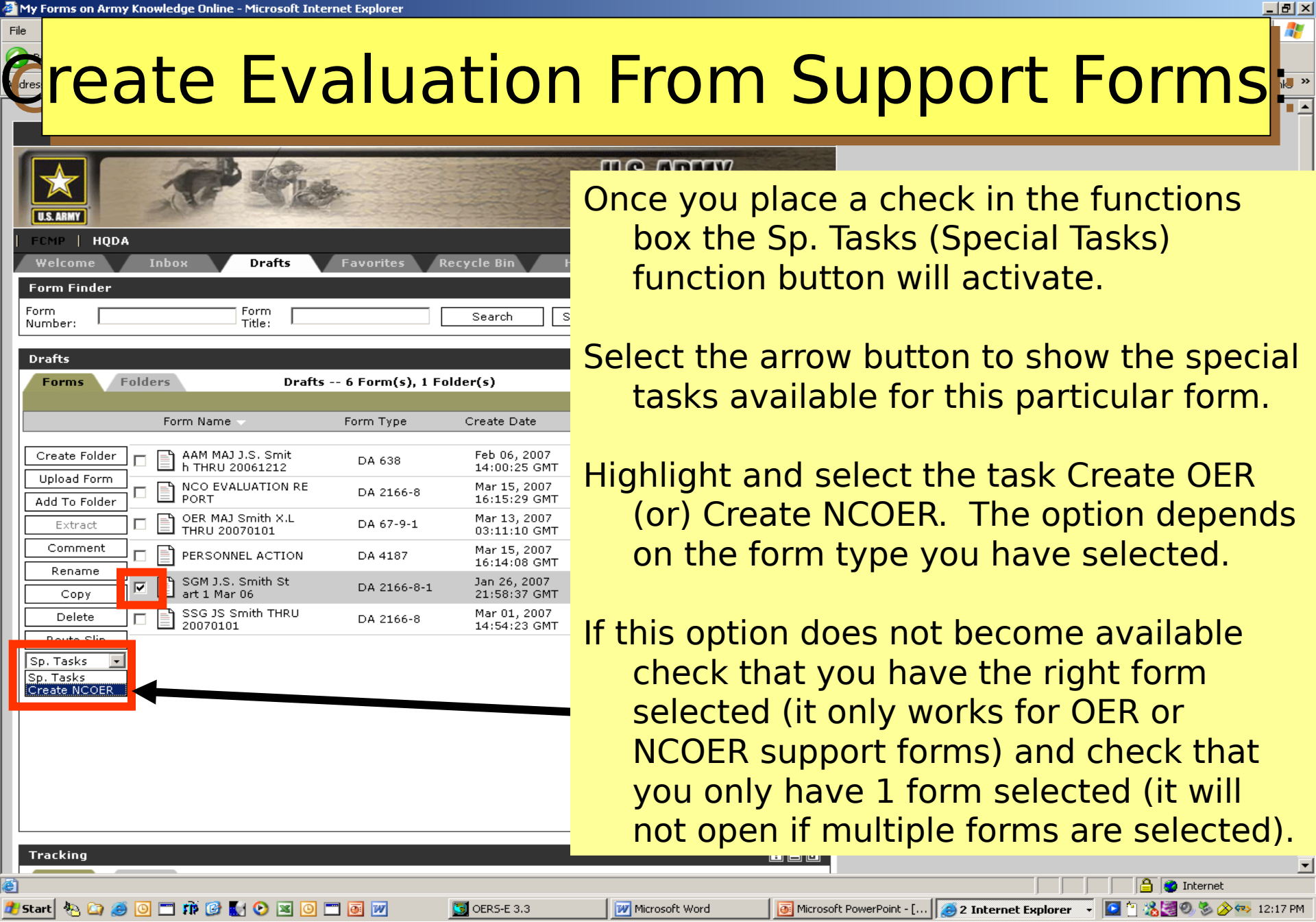
Additional Pages For OER Spt Form:


https://myforms.us.army.mil/wps/PA_1_0_CH/DownloadFormServlet?field.formid=94%203%20ICM8%20icmn - Microsoft Internet Explorer
Attach Enclosure
Display Enclosure
Extract Enclosure
Remove Enclosure
OFFICER EVALUATION REPORT SUPPORT FORM
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.
PART I - RATED OFFICER IDENTIFICATION
NAME OF RATED OFFICER (Last, First, MI)
SSN
RANK
DATE OF RANK (YYYYMMDD)
BRANCH
DESIGNATED/PMOS
UNIT, ORG., STATION ZIP CODE OR APO, MAJOR COMMAND
STATUS CODE
FROM DATE
UIC
CMD CODE
PSB CODE
PART II - AUTHENTICATION
NAME OF RATER (Last, First, MI)
NAME OF INTER. RATER (Last, First, MI)
NAME OF SENIOR RATER (Last, First, MI)
POSITION
PART III - VERIFICATION OF FACE-TO-FACE DISCUSSION
MANDATORY RATER / RATED OFFICER INITIAL FACE-TO-FACE COUNSELING ON DUTIES, RESPONSIBILITIES AND PERFORMANCE OBJECTIVES FOR THE CURRENT RATING PERIOD TOOK PLACE ON
(Date)
Rated Soldier Initials
Rater Initials
Senior Rater Initials (Review)
PERIODIC RATER / RATED OFFICER FOLLOW-UP FACE-TO-FACE COUNSELINGS:
Dates

Additional pages are added to an OER support using an attachment. Select Attach Enclosure and browse to a document that is already created.

As of 19 Mar 07 –when you sign a support form it locks down the attachment from being viewed by anyone else (to include the person who attached it). This is an error in the form we are working to get fixed. Check that you can display the enclosure after signature. Temp work around is to not sign the report with an attachment but make a note of why you didn't sign in the accomplishments section of the form.

Create Evaluation From Support Forms



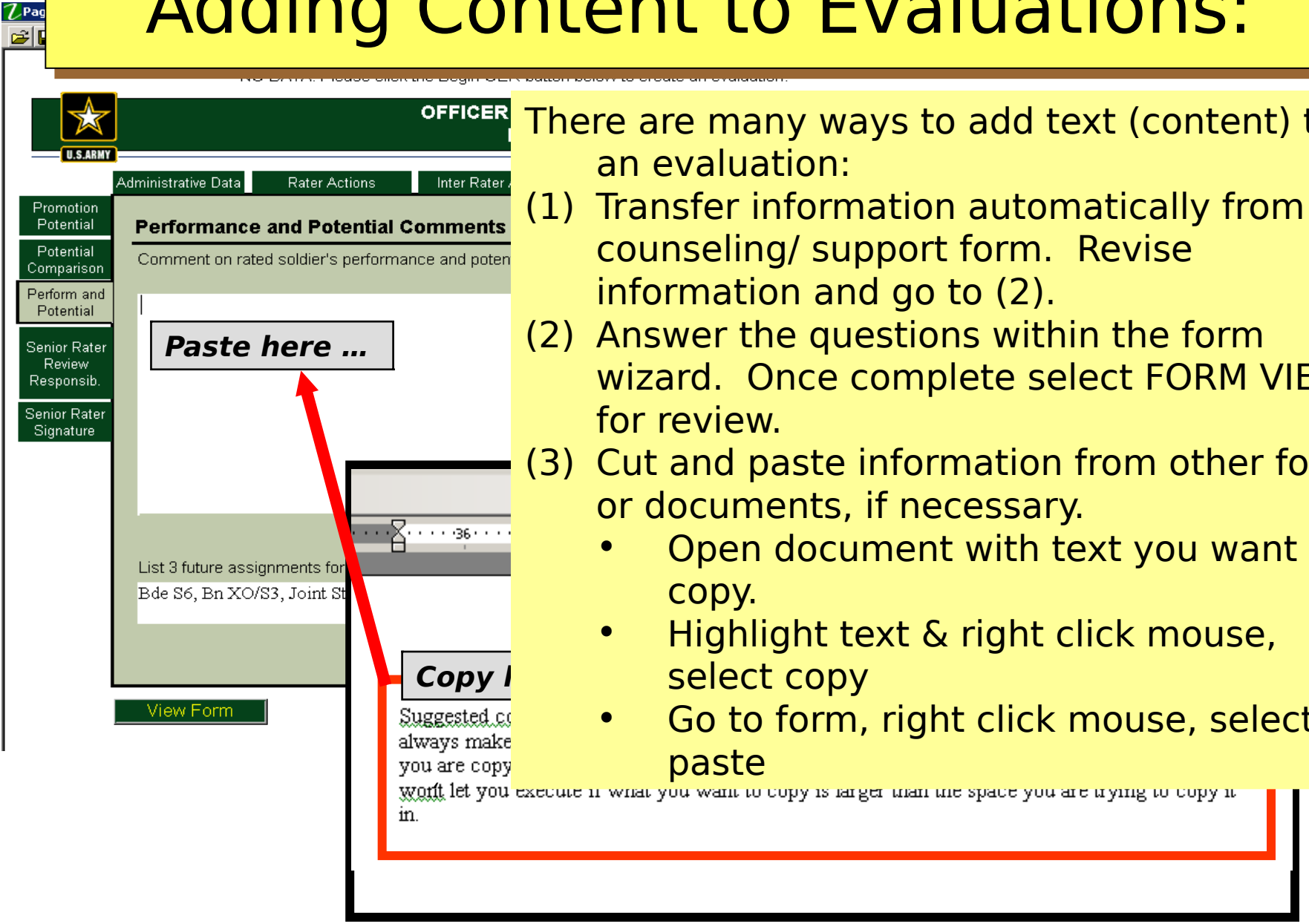
Once you place a check in the functions box the Sp. Tasks (Special Tasks) function button will activate.

Select the arrow button to show the special tasks available for this particular form.

Highlight and select the task Create OER (or) Create NCOER. The option depends on the form type you have selected.

If this option does not become available check that you have the right form selected (it only works for OER or NCOER support forms) and check that you only have 1 form selected (it will not open if multiple forms are selected).

Adding Content to Evaluations:



There are many ways to add text (content) to an evaluation:

(1) Transfer information automatically from the counseling/ support form. Revise information and go to (2).

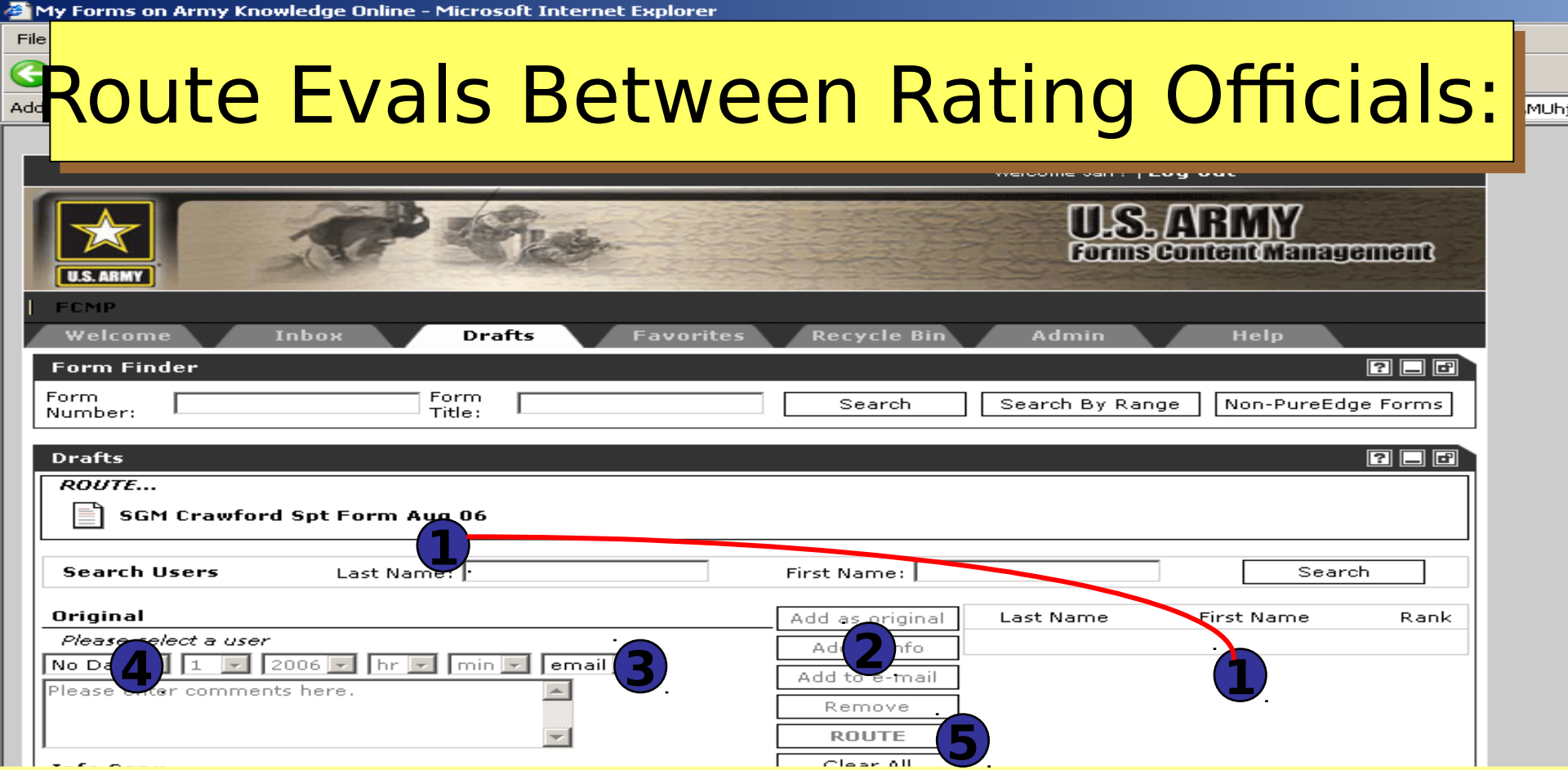
(2) Answer the questions within the form wizard. Once complete select FORM VIEW for review.

(3) Cut and paste information from other forms or documents, if necessary.

- Open document with text you want to copy.
- Highlight text & right click mouse, select copy
- Go to form, right click mouse, select paste

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08

Route Evals Between Rating Officials:



When Route function is selected, this page appears. Steps include:

1. Select a recipient of the document (names will appear on right side)
2. Choose the type of document transmission
3. Decide if a notification email is needed
4. Decide if a suspense date/time is needed
5. Click on Route button

This page is being revised by APD and, once complete, will be user

Route Evals Between Rating Officials:

Use My Forms routing whenever possible because it:

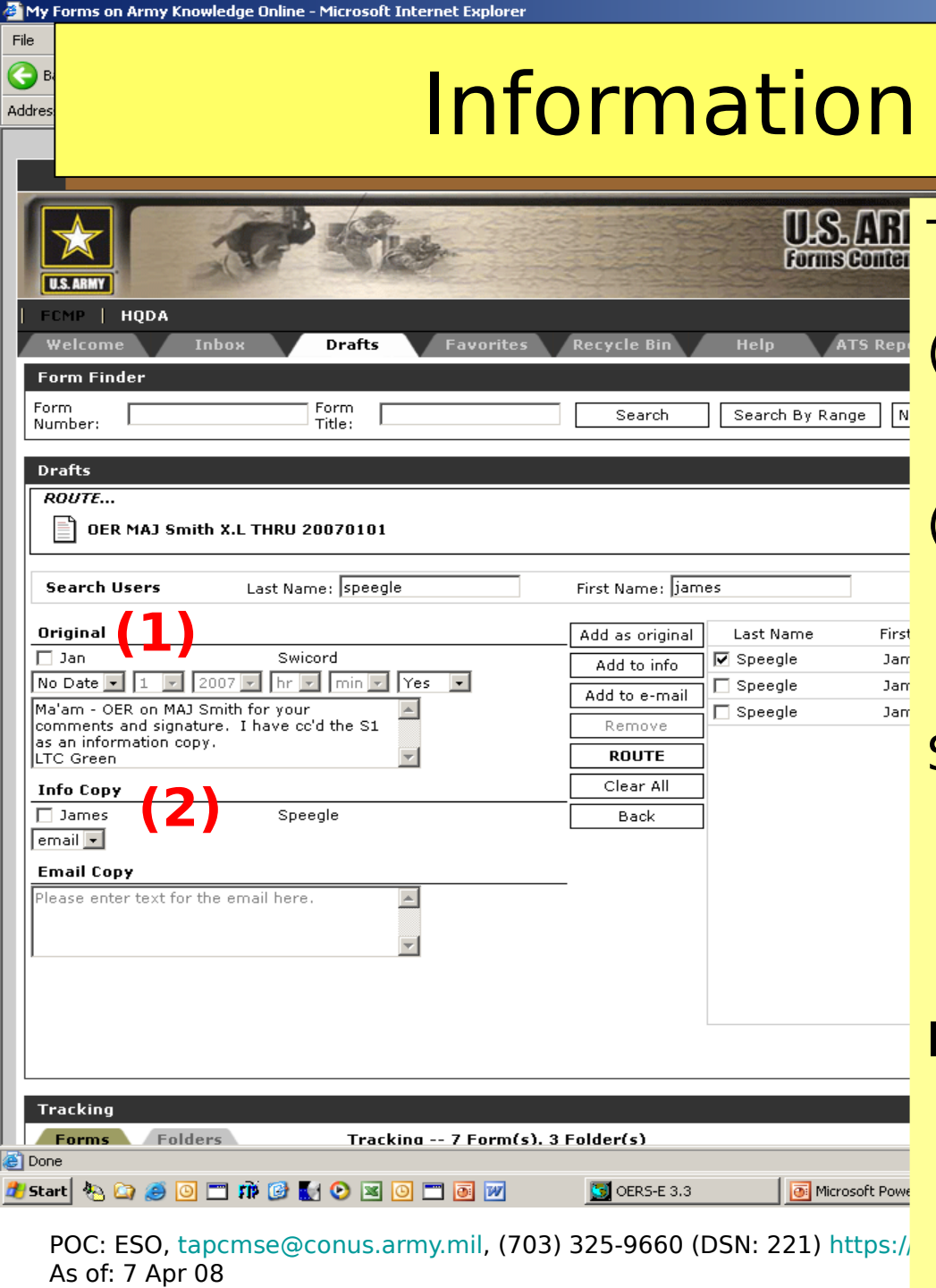
1. Provides tracking & accountability capability
2. Is fast and reliable
3. Results in the least amount of problems with eval forms

Take a form out of My Forms and email it? You can - when a rating official does not have an AKO logon or access to AKO but has a CAC reader for signature, BUT – doing so results in the greatest amount of our technical problems while uploading & submitting.

General Routing Notes:

1. AR 623-3 and DA PAM 623-3 detail an order for completion.
2. Rated officer and rated NCO should see completed report.
3. Individuals not physically in rating chain, but who need to view or comment (i.e., CSM, S1), can be sent

Information Copies:



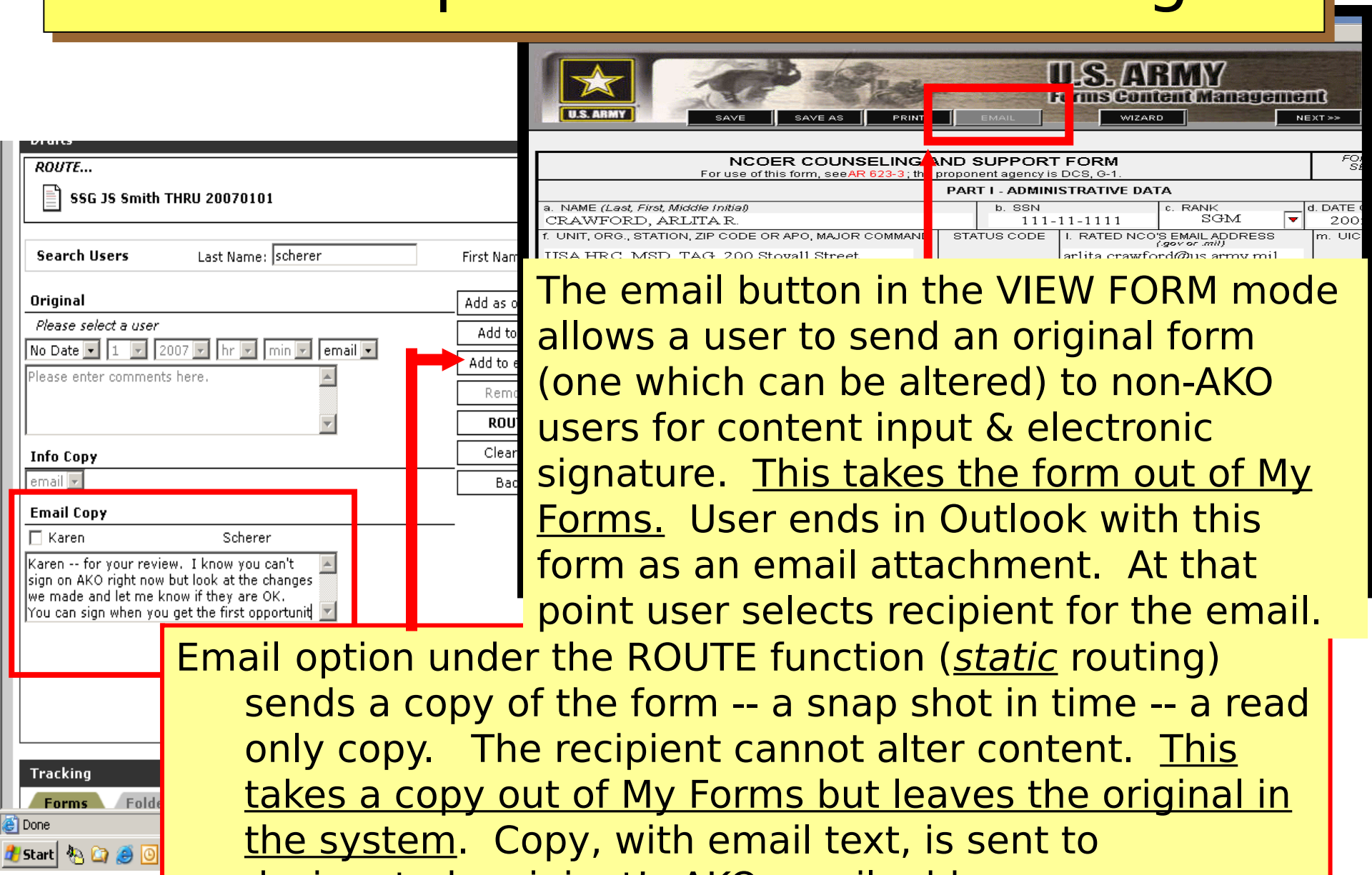
This example shows:

(1) The original going to the rater (with reminder email & text) and
(2) an information copy being sent to the S1 (for tracking)

Sender had to search on a second name to come up with a recipient for this info copy.

In this instance both recipients get an email to their AKO addresses notifying them that a form has been routed to their

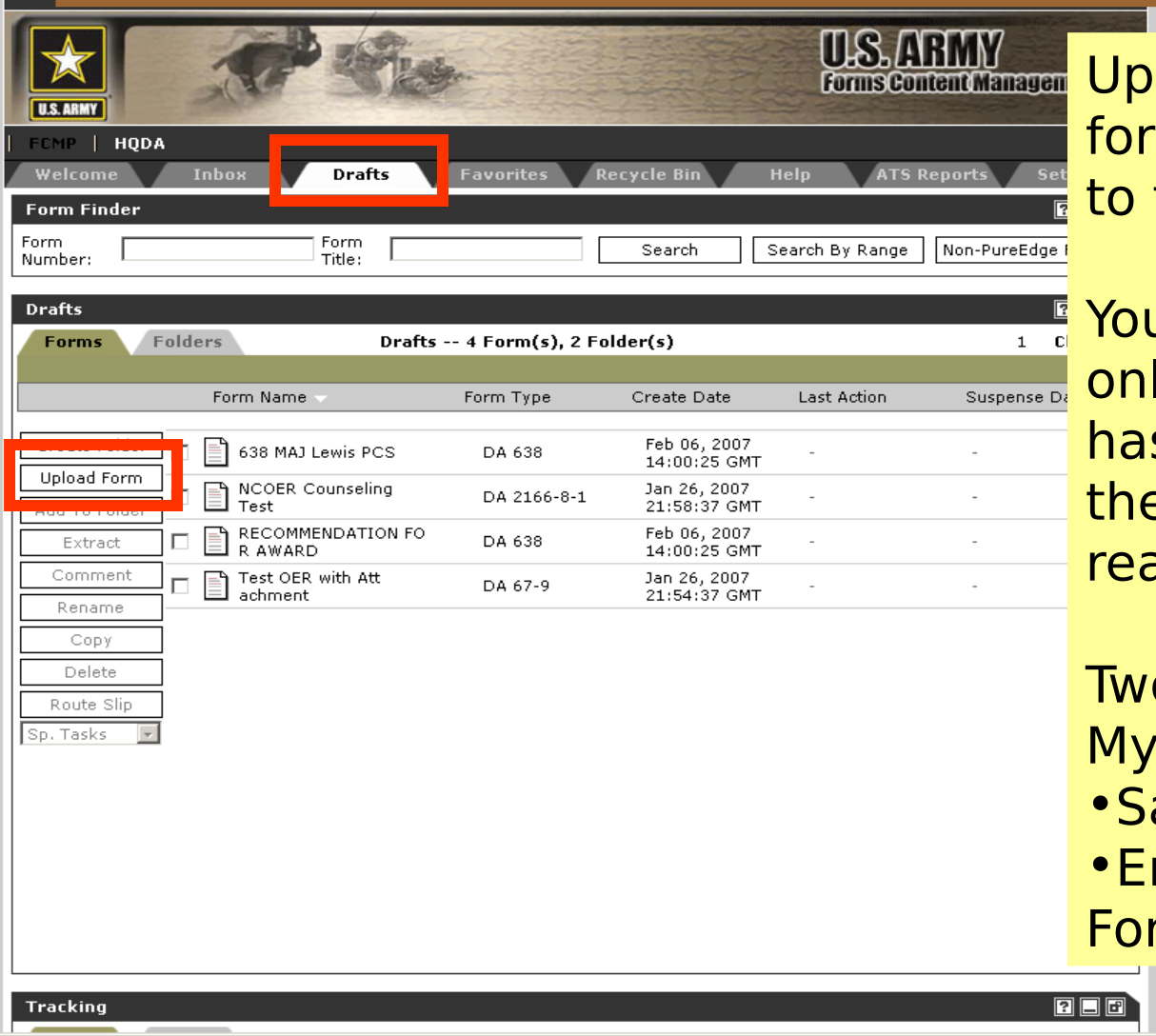
Email Copies vs. Email Routing:



The email button in the VIEW FORM mode allows a user to send an original form (one which can be altered) to non-AKO users for content input & electronic signature. <u>This takes the form out of My Forms.</u> User ends in Outlook with this form as an email attachment. At that point user selects recipient for the email.

Email option under the ROUTE function (<u>*static*</u> routing) sends a copy of the form -- a snap shot in time -- a read only copy. The recipient cannot alter content. <u>This takes a copy out of My Forms but leaves the original in the system</u>. Copy, with email text, is sent to designated recipient's AKO email address.

Upload a Form into My Forms:



Upload any PureEdge form from a local drive to the My Forms Portal

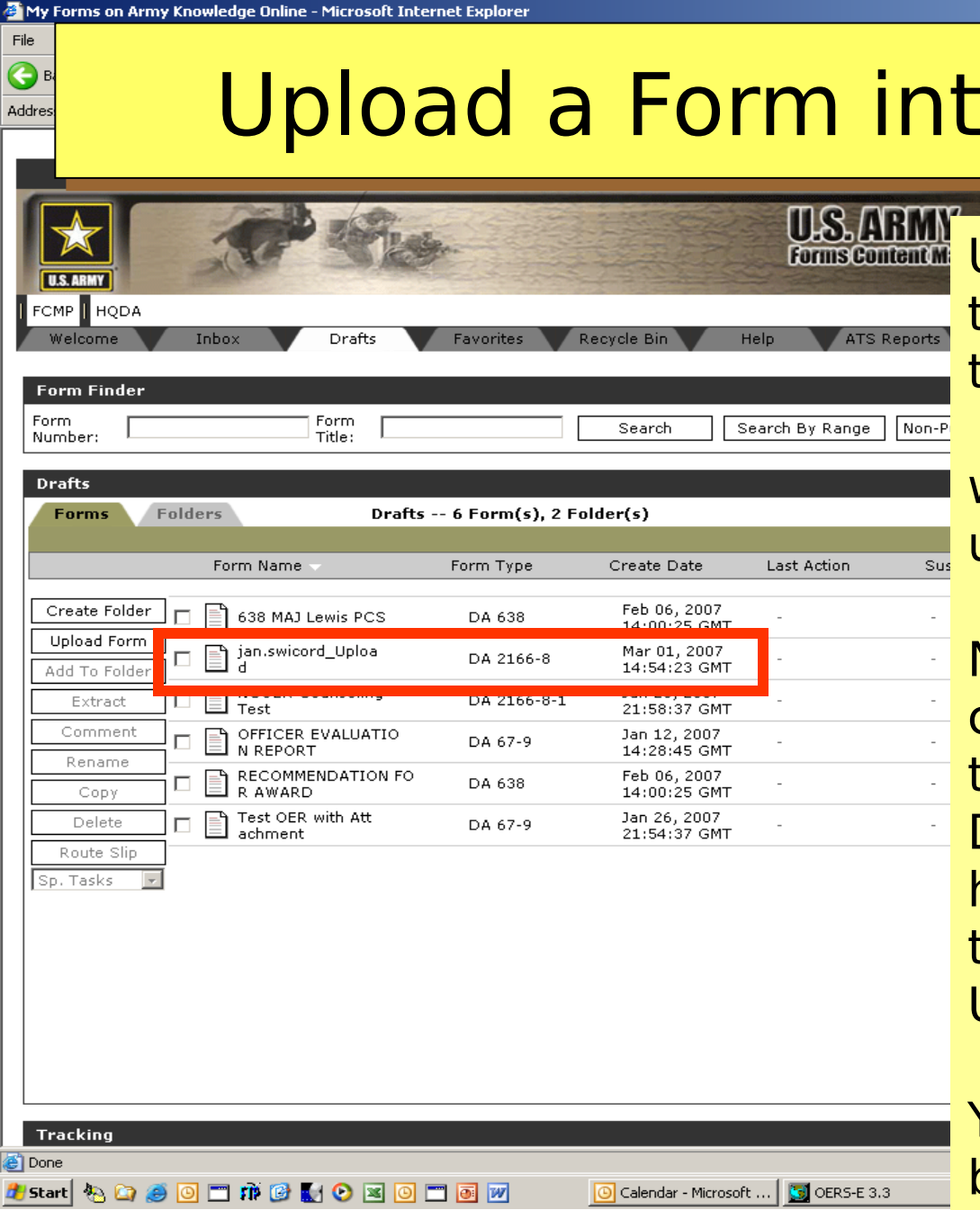
You need to use this only if the form original has been taken out of the system for any reason.

Two ways to get out of My Forms:

- Save As
- Email from inside Form

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08

Upload a Form into My Forms:



Upon successful upload, the computer will return you to the DRAFT tab

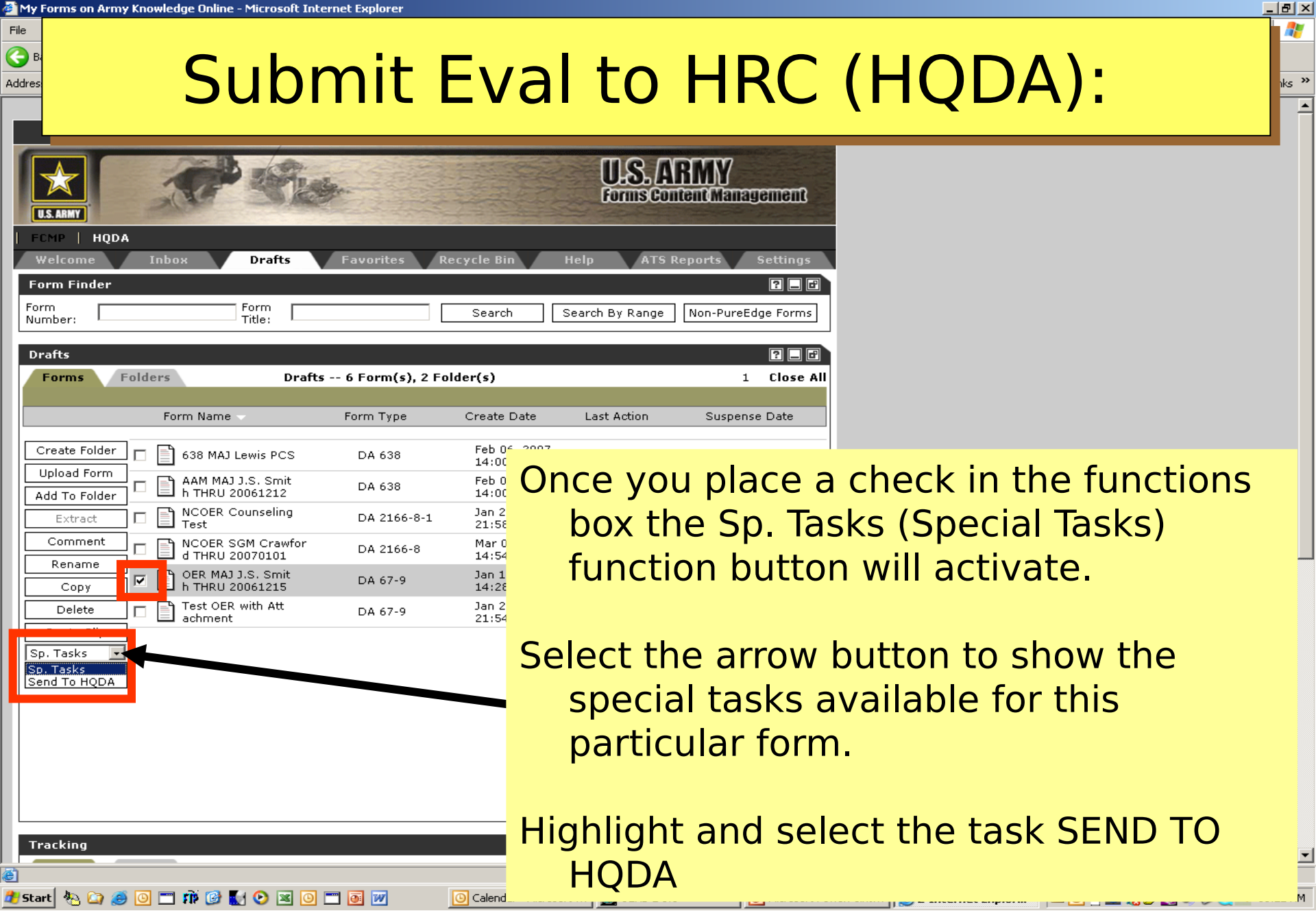
where you will see your uploaded form.

NOTE: The form name changes if was renamed at the outset. Army Publishing Directorate is working to have uploaded forms retain the original name at upload. Until then…

You can rename the form back to what it was.

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08

Submit Eval to HRC (HQDA):



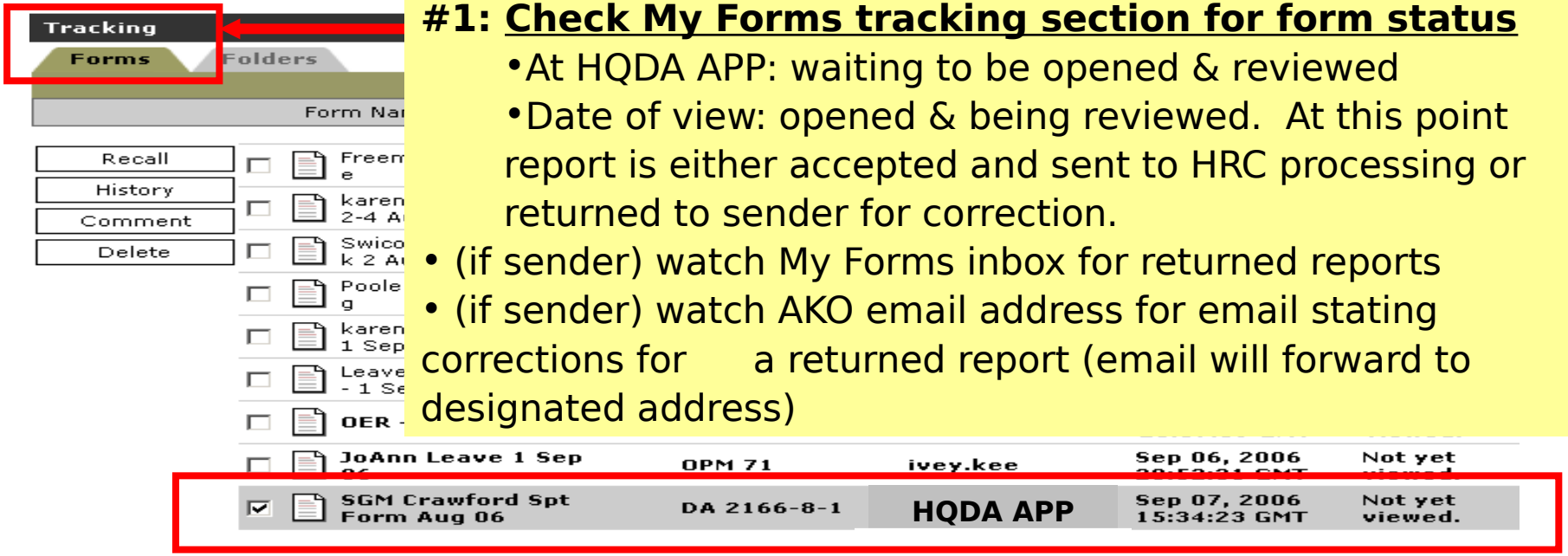
Once you place a check in the functions box the Sp. Tasks (Special Tasks) function button will activate.

Select the arrow button to show the special tasks available for this particular form.

Highlight and select the task SEND TO HQDA

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08

Check for Receipt at HRC:

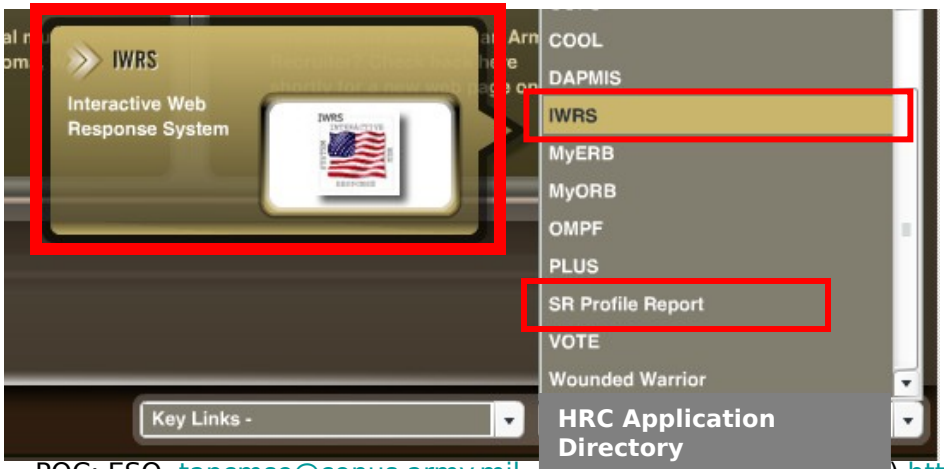


#1: <u>Check My Forms tracking section for form status</u>

- At HQDA APP: waiting to be opened & reviewed
- Date of view: opened & being reviewed. At this point report is either accepted and sent to HRC processing or returned to sender for correction.

• (if sender) watch My Forms inbox for returned reports

• (if sender) watch AKO email address for email stating corrections for a returned report (email will forward to designated address)



<u>Interactive Web Report System (IWRS)</u>

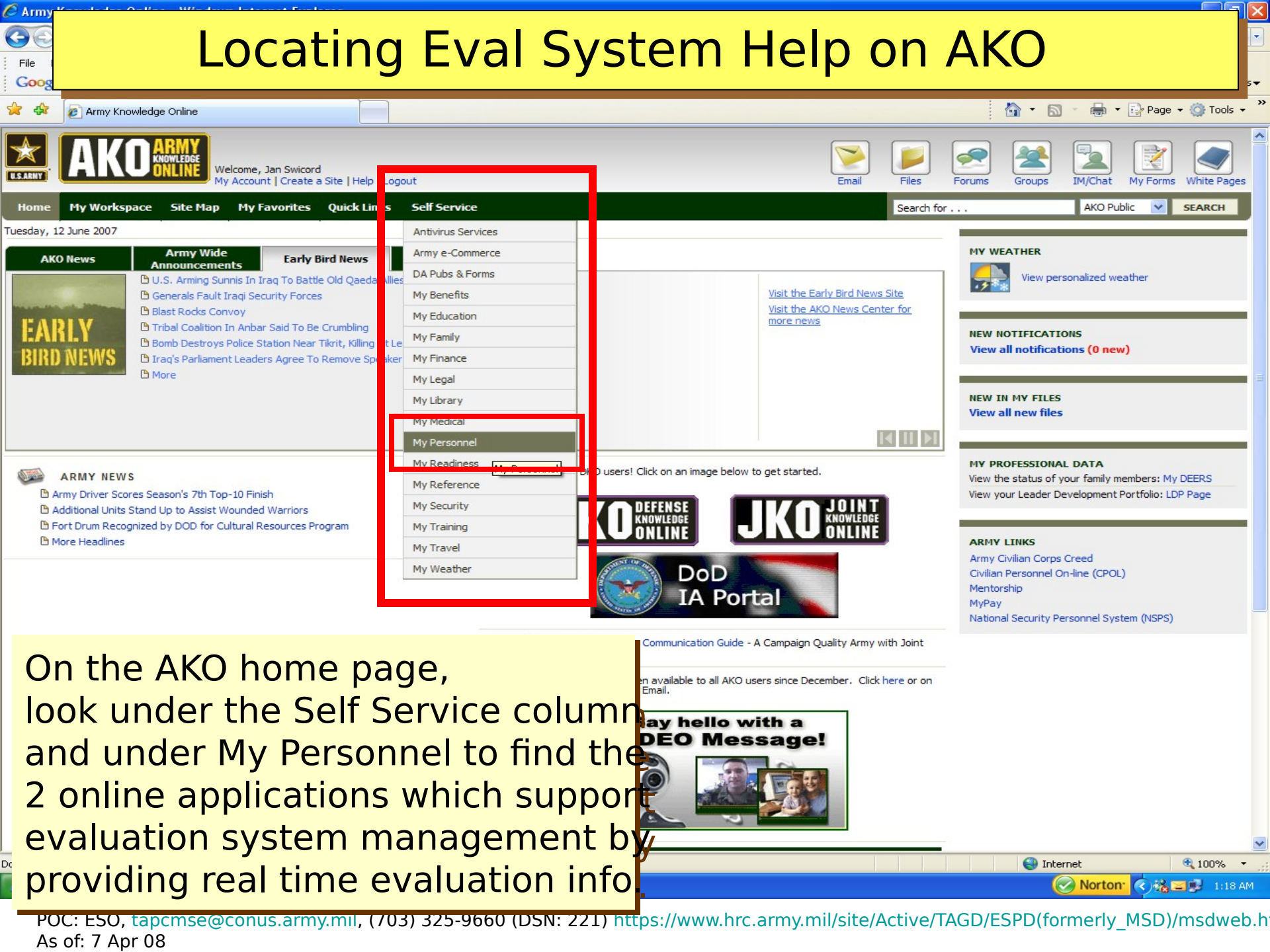
-Accessed by AKO login & password

-For OER: this is a window into HRC level processing (for constant status, found errors, admin information) which is essential for proactive management of evaluation systems by HR managers, SR, and Cdr.

-NCOER information will be reflected 1 May 2008.

-Reports are constantly improved and increased

Locating Eval System Help on AKO



On the AKO home page,
look under the Self Service column
and under My Personnel to find the
2 online applications which support
evaluation system management by
providing real time evaluation info.

POC: ESO, tapcmse@conus.army.mil, (703) 325-9660 (DSN: 221) https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.h
As of: 7 Apr 08

Use of Comments Function:

- Comments can be used to help keep a report processing.

- A CSM or S1 can enter a note that they have completed their review and the report is ready to be sent to HRC.
- Anyone can enter the date due to HRC.
- Anyone who has the form in his/her tracking has access to these comments.
- Don't use for comments of a very personal nature – everyone reads them!
- Comments here do not get included with an eval in an OMPF.

HRC Actions at Receipt

When a report is electronically submitted to HRC a processor opens the form and completes an initial review. If any errors are found the report is returned to the sender for correction. An email is sent to the senders AKO address explaining what is wrong with the report.

- Our goal is a 24-48 hours turn around (not counting weekends)
- Reports have been coming back to us (corrected) within the same time frame – some take longer.
- This process allows us to get the report through the HQDA processing and into a rated Soldier's OMPF much faster.
- If no errors are found the report is accept and sent on for OMPF.

FYI:
-Many reports arriving in paper copy today to HRC have errors on them.
-Errors delay processing as we either stop to (1) reject or (2) make a correction.
-We try to not make a correction without contacting senior raters first.
-Our AKO process lets you make the correction (the right people to do so) and learn for future reports.
-Reports that arrive without error should not take as long to get to a Soldier's OMPF.

Common Concerns From New Users

- **Concern: Technology allows anyone to send a completed report to HQDA**. **Response:** Designate the process for your organization in an SOP and talk through the process at OPD /NCOPD or staff calls. Be flexible in difficult cases.
- **Concern: Can you delete my reports?** **Response:** Only form originators can delete.
- **Concern: I cannot make changes to my tracking copy**. **Response:** Conduct face-to-face meetings, make telephone calls or email, print & ink copies. You can still recommend changes when you see they are needed even if all you have is an information tracking copy.
- **Concern: Do I need a special proxy? Can I help my senior rater with his/her comments?** **Response:** Provide input to rating officials using a support form or face to face contact. Or, when routing evaluations, you can: (1) put notes in an email message that routes with the document. Only the recipient of the original is able to view these comments, (2) Add information to blocks designated for other rating officials. They must review, delete, change, or accept elements as their own before signing evaluations.
- **Concern: When is HRC going to make everybody use this system?** **Response:** After 1 April 2008 all reports submitted to HRC for processing to an OMPF should be sent via My Forms on AKO.

Evaluation System Office Goals

- 100% Accountability (knowing where a report is at all times)
- 100% Accuracy (in content and processing)
- Speed through the system (from THRU date to OMPF)
- One Army standard (policy, procedures, access for information and submission)

From these goals our initiatives and actions fall …

Eval Information Sources

1. **AR 623-3 and DA PAM 623-3**
2. **AKO My Forms wizard form formats**
3. **Evaluation Systems Office homepage: See POC list below.**
4. **Online applications and tools – IWRS for AC OER, AC NCOER reports, 2x Citizen reports, & GKO reports for ARNG.**
5. **Human Resources Command offices:**
   - **Policy: (703) 325-9660 (DSN: 221), tapcmse@conus.army.mil**
   - **Appeals & Corrections: (703) 325-8642 (DSN: 221)**
   - **If not able to get online, SR Profiles (& currently working an initiative to combine):**
     - **Active & USAR (703) 325-9660 (DSN:221), tapcmse@conus.army.mil**